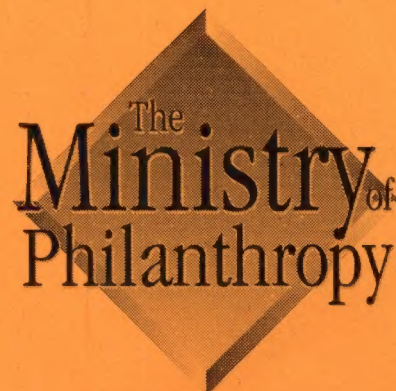


Every man is entitled
to be valued based on his
best moments

Welcome	1-1
Conference Program	1-2
Blackbaud & Data Miner	1-4
Trailblazer Banquet	1-8
Schedule At-a-Glance	1-14
Know-how Pow-wows (Round Tables)	2-1
Showcase of Ideas	3-1
Flashback to the 1996 Conference on Philanthropy	4-1
Speaker Biographies & Handouts	5-1
Conference Center Room Map	6-1
Conference Planning Committee	6-2
Track Evaluation Forms	6-3
Final Evaluation Form	6-4
<i>Philanthropic Dollar</i> Quick Survey	6-5
Suggestion Blanks	6-6
Roster of Attendees	7-1
Philanthropic GIFT	8-1

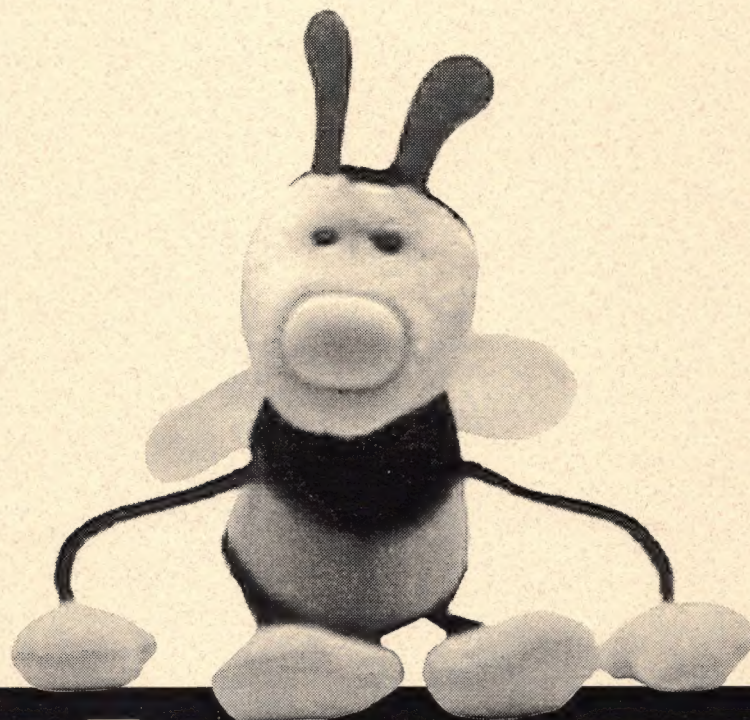
CONTENTS



The
Ministry of
Philanthropy

Section 1

1999 Conference on
Philanthropy



Program

BSI

Welcome

to the 8th Conference on Philanthropy

Welcome to PSI's eighth Conference on Philanthropy. I am happy that you are here and I look forward to our time together over the next few days.

Our theme for this conference "The Ministry of Philanthropy" emerged a year ago, after a day with the conference committee (see page 6-2). As we discussed what we sought in our work and in our lives and what brought us fulfillment, it became clear. It was important for us to know our work in philanthropy was a ministry to those who benefitted from philanthropic gifts—patients, students, staff, and others with particular needs. Yet there surfaced a strong belief that philanthropy was a ministry in itself. We minister to our colleagues by calling them to a deeper commitment to their organization. We minister to those who partner with us by giving of their time and funds. By encouraging people to give, we provide an avenue to meet an essential human need—making a difference for others.

But those in ministry need to be energized and inspired from time to time. And we think you will find ample opportunity here at the Conference on Philanthropy.

Inside you will find an impressive list of speakers and topics. I am still awed by the willingness of our speakers to come to our small conference and share with us. You may feel as I do that the hardest part of this conference will be to find a way to be in several sessions at once. I'm grateful for the general sessions where I don't have to feel so torn. And by the way, you'll miss a good share of the conference unless you go to the round table forums—so start your day early. Then you'll be ready for the spiritual renewal time with Bj. Christensen.

If you're new to the profession sign up for a mentor. Over the years, several people have served as my mentors and they have had a great impact on me. If you are a more seasoned professional you need to become a mentor.

I'm confident that you will leave this conference with new friendships, a lot of information, and a deeper sense of the opportunity for ministry in your work and profession. So I invite you to have a great time, fill your mind with valuable ideas, and leave with bundles of materials and books to keep challenging you. Finally, the meals are buffet-style—have that second dessert. I intend to!



Carolyn Hamilton
*Chair, Conference on
Philanthropy*



SATURDAY June 26

Schedule of Events

Saturday, June 26

10:30 am
Three-day Series

A Ministry of Influence

Speaker: Bj. Christensen

PSI Board Chair

Host: David Burghart, CFRE

Southern Adventist University

Sundance Terrace

12:30 pm

Picnic lunch

Garden of the Gods

7:00 pm

Wedgwood Sacred Concert

Welcome: Ken Turpen, CFRE

PSI

Centennial Ballroom

8:00-11:00 pm

Registration

Centennial Gallery

8:00 pm

Welcome Reception

Hosts: Kellie Lind

Pacific Union College

Chris Gaines

Campion Academy

Centennial Ballroom

9:00 pm

An Evening with Bob, Don, Jerry & Dick

The
Ministry
of
Philanthropy

Visit the Hospitality Desk—Colorado Gallery

Hours: *Sunday—7:30-9:00 am, 10:30-12:30 pm, 2:15-5:30 pm*
Monday—7:30-9:00 am, 12:30-1:30 pm, 2:45-4:45 pm
Tuesday: 7:30-9:00 am, 10:00-10:15

Sunday, June 27

6:30-8:00 am

Breakfast

Mountain View Dining Room

7:30-9:00 am

Registration Desk Open

Colorado Gallery

Know-how Pow-wows

8:00-8:45 am

Round Table Discussions

Hosts: Elaine John

St. Helena Hospital

David Kinsey

Loma Linda University

Mountain View Dining Room

Spiritual Renewal

9:00 am

A Ministry of Influence

To be successful or make a positive impact in our organizations and community, we must become people of influence. Each morning you will have the opportunity to explore the ministry skills and gifts necessary to positively impact those with whom we interact. Exploring your ministry of influence will greatly impact your work and every other aspect of your life.

Speaker: Bj. Christensen

PSI Board Chair

Host: David Burghart, CFRE

Southern Adventist University

Music: Lisa Jardine

Andrews University

Prayer: Becky May

Andrews University

Colorado

Great People Gathering

9:30-10:30 am

Welcome

Carolyn Hamilton

Chair, Conference on Philanthropy

General Session

The Ministry of Philanthropy

A fund raiser's self-understanding, value commitments, and dedication to the cause are critical in the philanthropic process. Gain a better understanding of the relationship between the cause and the fund raiser and the ethical dimensions surrounding the ministry of philanthropy.

Speaker: Lawrence Jones

Dean Emeritus of Howard University

Host: John Korb, CAHP

Adventist Medical Center

Colorado

SUNDAY June 27

The
**Ministry of
Philanthropy**

SUNDAY June 27



10:30-5:00 pm

Exhibit

Data Miner and Blackbaud—The Razor's Edge for Windows. Find out how these software packages can help your organization's effectiveness. Sign up at the registration or hospitality desk for a personal tour.

Philanthropic GIFT Booth open.

Colorado Gallery

10:30-10:45 am

Break

Blackbaud, Data Miner, Philanthropic GIFT

Blackbaud



Trey McLaughlin, account executive with Blackbaud, will be available to answer any questions you have regarding the Raiser's Edge for Windows

and converting from Fund Master. Take advantage of this opportunity to see first-hand what a powerful tool the Raiser's Edge can be in helping your organization succeed in its fund raising efforts. Blackbaud and PSI continue to partner in providing your organization with one of the world's leading software packages. Sign up for a personal tour on Sunday or Monday from 10:45 a.m. to 5 p.m. in the Colorado Gallery.

Data Miner

David Morgan, with the Council for Aid to Education (CAE), will be available to show you how Data Miner, a statistical software program available through PSI's web site, can help you evaluate and compare the effectiveness of your organization's fund raising efforts. Data Miner has been available to PSI's education clients for some time. We are pleased to announce that this service is now also available for PSI's healthcare clients as well. And if you are wondering where the statistical information comes from, recall those lovely reports PSI hassles you for each year! Sign up for a personal tour on Sunday from 10:30 a.m. to 5 p.m. in the Colorado Gallery.

Philanthropic GIFT



Randy Fox will be at the Philanthropic GIFT booth to talk with you and show you an optional layout for the 2000 *Giving is Caring* calendar, philanthropy stamp posters, Philanthrobee, note cards, and custom imprinted promotional products. He also has 30 professional development books you can browse through and purchase at a low, subsidized price, not to mention that you'll save shipping charges. He also has catalogs of custom imprinted promotional products you can order.

Tribal Councils

Gathering of Chiefs

CEO Track (CEOs, presidents, and principals only, please)

10:45-12:00 pm

The CEO and the Board: Cooperation vs. Competition

When both the CEO and the board discover their unique and non-competing roles, their partnership empowers the whole organization. CEOs need to help select good board members, orient them, engage them, inform them, and challenge them to good work, thus allowing boards to serve their policy role effectively and CEOs to lead in the style of a true servant-leader.

Speaker: Bob Andringa

Council for Christian Colleges & Universities

Host: David Colwell, CFRE

Loma Linda University Medical Center

Executive Presentation Room

10:45-12:00 pm

Track I

The Nuts & Bolts of Annual Giving

Learn to organize and implement an effective annual fund, from direct mail and phonathons to reporting your results.

Speaker: Ed Ammon, CFRE

Walla Walla College

Host: Manzoor Massey

San Joaquin Community Hospital

Gunnison Rio Grande

Track II

Building Effective Relationships with Volunteers and Donors

Giving volunteers and donors the opportunity to become involved at a meaningful level is the foundation to any successful philanthropy program. Learn how to find, attract, and train the best volunteers for your organization and how to strengthen your organization's donor relationships.

Speaker: Brooke Sadler, CFRE

Rocking Chair Consultants

Host: Karen Lippert

Florida Hospital Foundation

White River

12:00-1:00 pm

Lunch

Mountain View Dining Room

12:00-1:00 pm

Newcomers Luncheon

By invitation only. Bring your lunch to the Remington Dining Room for the opportunity to talk with PSI's director emeritus Milton Murray.

Host: Milton Murray, CFRE, FAHP

Remington

SUNDAY June 27

The
**Ministry of
Philanthropy**

SUNDAY June 27



Great People Gathering

General Session

1:00-2:15 pm

Board Excellence: Can an Organization Be Better Than Its Own Board?

Excellent ministries have excellent boards. It takes both the help of senior staff and the board itself to clarify the mission, engage the right board members, understand new trends, make committees work effectively, and focus on results, not just means. Primary beneficiaries and donors of any nonprofit organization appreciate quality boards.

Speaker: Bob Andringa

Council for Christian Colleges & Universities

Host: W. G. Nelson

Walla Walla College

Colorado

2:15-2:30 pm

Break

Tribal Councils

Gathering of Chiefs

CEO Track (CEOs, presidents, and principals only, please)

2:30-3:45 pm

The Role of Leadership in Philanthropy

How do you find the best leaders for your organization—leaders that can inspire confidence and action? Learn how to recruit and develop such leaders and how to empower them to build your organization for the future.

Speaker: Jerry Panas

Jerold Panas, Linzy & Partners

Host: Larry Geraty

La Sierra University

Executive Presentation Room

Track I

What Can You Get for 33 Cents?

Find out what it takes to run an effective direct mail program—what works and what doesn't in a changing world of high tech communications and distinct demographic trends. Learn the essentials of a complete direct mail program and the tools for making your direct mail efforts grow. The fundamentals of direct mail will help you know a great letter when you see one—or write one. You'll leave knowing the one word which determines your direct mail success.

Speaker: Carolyn Hamilton

Hamilton & Associates

Host: David Burghart, CFRE

Southern Adventist University

White River

Track II

Clans, Cocoons & Conservatives

Bring new life to your alumni programs by understanding societal trends. This interactive session will give you creative ideas for involving alumni in their school.

Speakers: LuAnn Davis, CFRE
Union College
Becky May
Andrews University
Host: Linda Skinner
Union College
Gunnison Rio Grande

Track III

Advanced Planned Giving: Converting Challenges to Opportunities

For those with planned giving experience: gain a greater understanding of real estate acquisitions, transactions involved in preventing institutional loss, and maximize the advantages of planned giving while minimizing legal liability. Learn to spot potential problems before they arise, to deal with issues and problems that currently exist and new rules, laws, and regulations on the horizon.

Speaker: Cyril Chern, CFRE, A.I.A., Esq.
Attorney at Law
Host: Diana Fisher
Loma Linda University
Platte

3:45-4:00 pm

Book Signing

Finders Keepers and other titles by Jerry Panas.
Philanthropic GIFT booth open.

Colorado Gallery

Tribal Councils

4:00-5:15 pm

Track I

Planned Giving Basics: 10 Easy Answers to 10 Hard Questions

Explore planned giving and its opportunities and challenges for your organization. Learn basic planned giving methods, their uses, and how to develop a planned giving program; how to recognize risk areas and opportunities; and how to market planned giving in your community.

Speaker: Cyril Chern, CFRE, A.I.A., Esq.
Attorney at Law
Host: Jim Closser, CAHP
Tennessee Christian Medical Center
White River I & II

SUNDAY June 27

The
**Ministry of
Philanthropy**

SUNDAY June 27

The
Ministry of
Philanthropy

Trailblazer Award

The Trailblazer in Philanthropy Award is presented every three years at the Conference on Philanthropy to an outstanding professional who has "trail-blazed."

Award recipients are nominated by peers at Adventist colleges, universities, hospitals, and academies.

Join us at the Trailblazer Banquet, Sunday, June 27, as we honor those who have made significant contributions to philanthropy. Business attire is appropriate.



Past Trailblazers:

1996—Jack McClarty

1993—Don Prior

1990—Ruthita J. Fike

1987—T. Brooke Sadler & Herbert P. Ford

1984—Sheree Parris Nudd

1981—Oliver L. Jacques & William H.

Taylor

4:00-5:15 pm

Track II

Radical Recognition

Several presenters will spark your creativity to find new ways to say thank you. Share unusual ways they sought to recognize donors and encourage future giving.

Speakers: Kellie Lind

Pacific Union College

Jackie Bragaw

Enterprise Academy

Teresa Witt

Shady Grove Adventist Hospital

Moderator: Brooke Sadler, CFRE

Rocking Chair Consultants

Host: Jeannette Regalado

Walla Walla General Hospital

Gunnison Rio Grande

Track III

Numbers! Help! I Need an Interpreter!

Donors expect a return on their investment and want to give to organizations that practice careful fiscal management. The Council for Aid to Education (CAE) has developed a powerful tool for helping you show donors that your organization is positioned for making a difference, and you'll have the numbers to prove it.

Speaker: David Morgan

Council for Aid to Education

Host: Patsy Wagner

Project Patch

Platte

6:00 pm

Trailblazer Award Banquet

Keynote Speaker: Jerry Panas

Jerold Panas, Linzy & Partners

Introduction of Speaker:

Milton Murray, CFRE, FAHP

Master of Ceremonies: Brooke Sadler, CFRE

Rocking Chair Consultants

Colorado

9:00 pm

Book Signing

Finders Keepers and other titles by Jerry Panas.

The Makings of a Philanthropic Fund Raiser by Milton Murray, CFRE, FAHP.

Colorado Gallery

Monday, June 28

6:30-8:00 am

Breakfast

Mountain View Dining Room

Know-how Pow-wow

8:00-8:45 am

Round Table Discussions

Hosts: Elaine John

St. Helena Hospital

David Kinsey

Loma Linda University

Mountain View Dining Room

Spiritual Renewal

9:00 am

A Ministry of Influence

Speaker: Bj. Christensen

PSI Board Chair

Host: David Faehner

Andrews University

Music: Jo-Anne Vizcarra

STEP/UP, PSI

Prayer: Amy Kneller

Auburn Adventist Academy

Colorado

MONDAY June 28



MONDAY June 28

The
Ministry of
Philanthropy

Great People Gathering

General Session

9:30-10:45 am

Listening: A Gift from the Heart

Have you ever wondered why some people generate cooperation and support for their ideas while others struggle to be heard? Discover the secret to greater interpersonal effectiveness. Learn how to unlock closed minds, establish trust and rapport, handle conflict and get results. But mostly, discover why listening is the greatest gift we can give another human being—a gift that comes from the heart.

Speaker: Mary Jane Mapes

Mary Jane Mapes & Associates

Host: Pam Sadler

PSI

Colorado

10:45-5:00 pm

Blackbaud Exhibit

Find out what you can do to convert from Fund Master to the Raiser's Edge for Windows. Sign up at the hospitality desk for a personal tour.

Colorado Gallery

10:45-11:00 am

Break

Great People Gathering

General Session

11:00-12:15 pm

Showcase of Ideas

You've heard that imitation is the highest form of flattery? Here is your chance. Your colleagues will tell you about their most creative efforts. Get some great ideas to take home.

Hosts: Jackie Bragaw

Enterprise Academy

Chris Carey, CFRE

Andrews University

Chris Murray, CFRE

Glendale Adventist Medical Center

Colorado

12:15-1:15 pm

Lunch

Mentor Networking

Chris Carey, CFRE

Coordinator

Mountain View Dining Room

Tribal Councils

1:30-2:45 pm

Track I

Sharpening Your Arrows: Campaign Readiness

Raising capital funds today is not more difficult, but it is different. Understanding this difference is important to success. This presentation will outline the preliminary steps to a successful campaign, including the feasibility study, the case statement, and how to determine readiness for a campaign.

Speaker: Jerry Linzy
Jerold Panas, Linzy & Partners
Host: Jeff Veness
Pacific Union College
Colorado

Track II

Marketing Philanthropy

How do you tell your story or share your cause in a way that captures attention? Starting with the definition of marketing, walk through the steps to successfully market a philanthropy program. See examples that worked and others that didn't.

Speaker: Corina Car
Walla Walla General Hospital
Host: Karen Johnson, CFRE
Walla Walla College
White River I

2:45-3:00 pm

Break

Great People Gathering

General Session

3:00-4:45 pm

Major Gifts: A Love Story

Identification, information, interest, involvement, and investment are elements of a major gift program, as is cultivation. It is said that major gift fund raisers don't ask for gifts, they just cultivate, cultivate, and cultivate. How do you find major gift prospects? How do you gain their confidence and ultimate commitment? "I told him, I love you," she said. "He squeezed my hand," she added. It is a love story.

Speaker: Jerry Linzy
Jerold Panas, Linzy & Partners
Host: Mary Anne Chern, FAHP, ACFRE
White Memorial Hospital Charitable Foundation
Colorado

4:45 pm

Evening Recreation

Family Oriented Outings: Old Chicago Pasta & Pizza, Champions Golf & Games
Shopping: Hungry Farmer Restaurant, Garden of the Gods Trading Post
Sightseeing: The Loop (Mexican dining), Cave of the Winds/Laser Canyon
Sign up at the hospitality desk.

MONDAY June 28

The
**Ministry of
Philanthropy**

TUESDAY June 29



Tuesday, June 29

6:30-8:00 am

Breakfast

Mountain View Dining Room

Know-how Pow-wow

8:00-8:45 am

Round Table Discussions

Hosts: Elaine John

St. Helena Hospital

David Kinsey

Loma Linda University

Mountain View Dining Room

Spiritual Renewal

9:00 am

A Ministry of Influence

Speaker: Bj. Christensen

PSI Board Chair

Host: Greg Gerard

La Sierra University

Music: Paul Smith

Southern Adventist University

Prayer: John Peralta

Rio Linda Adventist Academy

Colorado

9:30 am

State of Philanthropy at Adventist Organizations

Find out where your organization fits in Adventist philanthropy and compare it to others in similar situations as yours.

Speaker: Ken Turpen, CFRE

PSI

Colorado

10:00-10:15 am

Break

Great People Gathering

General Session

10:15-11:30 am

Survival Skills for the 21st Century

Over the last three days you've gained lots of knowledge, gleaned new ideas, and are ready to charge forward. But you can't leave yet. You have *got* to hear Sean Joyce share poignant anecdotes on work and living. You'll laugh until your sides hurt and in the end you'll know there is no calling nobler than the ministry of philanthropy.

Speaker: Sean Joyce

Host: Joel Hass

Florida Hospital Foundation

Colorado

11:30-12:00 pm

Closing Remarks & Prizes

Host: Carolyn Hamilton & PSI
Colorado

12:00 pm

Lunch

Mountain View Dining Room

PSI hopes you leave this conference with valuable information, ideas, and friendships. We'll see you again in 2002, but in the meantime, please don't hesitate to call on us for information and resources on philanthropy. You'll find plenty of resources at www.philanthropicservice.com.

With Sincere Appreciation:

A very big *thank you* to those who worked tirelessly to make the eighth Conference on Philanthropy a success.

Carolyn Hamilton—thank you for the countless hours, late nights, your professionalism and friendship. You've helped us all minister more fully as professional fund raisers.

Committee members—thank you for sharing your energy and expertise in planning and organizing this conference. You set the standard for professionalism and we appreciate you.

Ed Ammon, CFRE
Jackie Bragaw
David Burghart, CFRE
Christopher Carey, CFRE
Mary Anne Chern, ACFRE, FAHP
Christopher Gaines
Elaine John
David Kinsey
Kellie Lind
Jeannette Regalado

To our speakers—thank you for giving so generously of your expertise. Your service to the profession inspire us all.

Kathi Basso—We come back to CMCR because of you. Thank you for making this conference run so smoothly.

Blackbaud—thank you for underwriting the conference shirts. We'll think of you each time we wear them.

With all our gratitude,
The PSI staff, Ken, Pam, Jeff, Chris, Randy, Jo-Anne, and Beth

TUESDAY June 29



SCHEDULE

Saturday, June 26

10:30 am	A Ministry of Influence
12:30 pm	Picnic lunch
7:00 pm	Wedgwood Sacred Concert
8:00-11:00 pm	Registration
8:00 pm	Welcome Reception
9:00 pm	Wedgwood

Sunday, June 27

6:30-8:00 am	Breakfast
7:30-9:00 am	Registration desk open
8:00-8:45 am	Round Table Discussions
9:00 am	A Ministry of Influence
9:30-10:30 am	General Session: The Ministry of Philanthropy
10:30-5:00 pm	Exhibit: Blackbaud & Data Miner
10:30-10:45 am	Break
10:45-12:00 pm	CEO Track: The CEO and the Board: Cooperation vs. Competition
10:45-12:00 pm	Track I: The Nuts & Bolts of Annual Giving
	Track II: Building Effective Relationships with Volunteers and Donors
12:00-1:00 pm	Lunch
12:00-1:00 pm	Newcomers Luncheon
1:00-2:15 pm	General Session: Board Excellence: Can an Organization Be Better Than Its Own Board?
2:15-2:30 pm	Break
2:30-3:45 pm	CEO Track: The Role of Leadership in Philanthropy
	Track I: What Can You Get for 33 Cents?
	Track II: Clans, Cocoons & Conservatives
	Track III: Advanced Planned Giving: Converting Challenges to Opportunities
3:45-4:00 pm	Book Signing
4:00-5:15 pm	Track I: Planned Giving Basics: 10 Easy Answers to 10 Hard Questions
	Track II: Radical Recognition
	Track III: Numbers! Help! I Need an Interpreter!
6:00 pm	Trailblazer Award Banquet
9:00 pm	Book Signing



Monday, June 28

6:30-8:00 am	Breakfast
8:00-8:45 am	Round Table Discussions
9:00 am	A Ministry of Influence
9:30-10:45 am	General Session: Listening: A Gift from the Heart
10:45-5:00 pm	Blackbaud Exhibit
10:45-11:00 am	Break
11:00-12:15 pm	General Session: Showcase of Ideas
12:15-1:15 pm	Lunch
1:30-2:45 pm	Track I: Sharpening Your Arrows: Campaign Readiness
	Track II: Marketing Philanthropy
2:45-3:00 pm	Break
3:00-4:45 pm	General Session: Major Gifts: A Love Story
4:45 pm	Evening Recreation

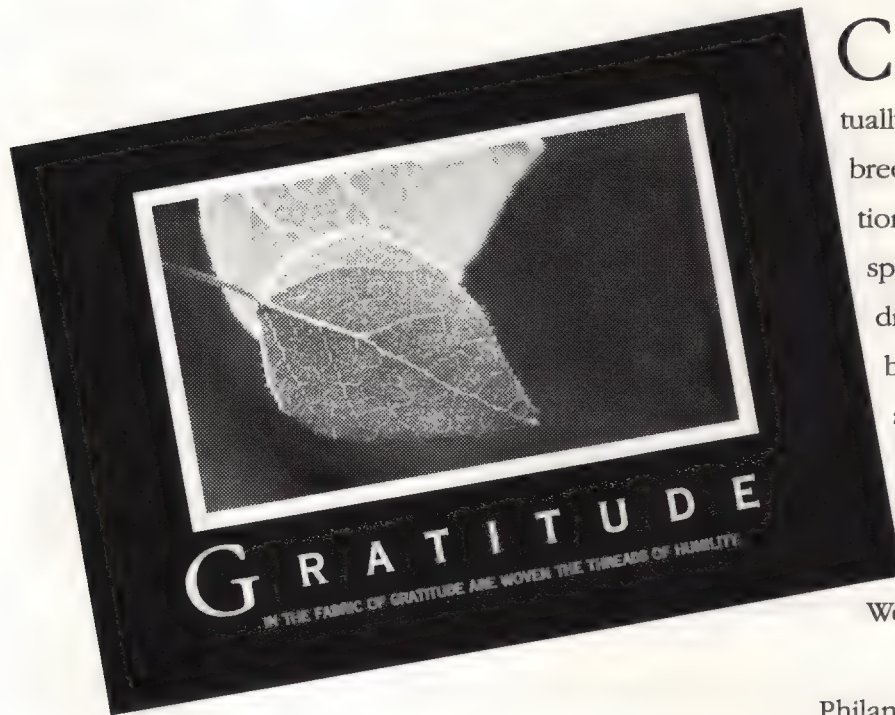
Tuesday, June 29

6:30-8:00 am	Breakfast
8:00-8:45 am	Round Table Discussions
9:00 am	A Ministry of Influence
9:30 am	State of Philanthropy at Adventist Organizations
10:00-10:15 am	Break
10:15-11:30 am	General Session: Survival Skills for the 21st Century
11:30-12:00 pm	Closing Remarks & Prizes
12:00 pm	Lunch

AT-A-GLANCE

The
Ministry of
Philanthropy

Is That Water on Your Keyboard?



Colors so vivid you can virtually smell the mountain breezes from your air conditioning. Morning dew on a spring Aspen leaf threatens to drip into your computer keyboard. A flaming sunset over a peaceful seascape makes you drowsy in your office chair.

Virtual reality?

Well, maybe.

**For more information come by the
Philanthropic GIFT booth in the Colorado
Gallery during the conference or contact
Philanthropic GIFT to order.**



Phone: 301-680-6135 • Fax: 301-680-6137

www.philanthropicgift.com

Philanthropic GIFT is pleased to introduce its new line of photo notecards. The vibrant color photos contrast vividly with the black background.

Does that sort of quality and feeling sound like something you can be proud to mail to your donors and friends? Try a set of notecards and see if they don't get a great response.

However, they won't get all that great response if they're in frames over your desk. Well, not from donors at least. And besides, water isn't good for your keyboard anyway.

The
Ministry of
Philanthropy

Section 2

1999 Conference on
Philanthropy



BI

Know-How Pow-Wows

Know-how Pow-wows

Round Table Discussions

Coordinators: Elaine John and David Kinsey



The Know-how Pow-wow round tables will take place each morning from 8 to 8:45 a.m. in the Mountain View Dining Room. Seating is limited to 10 at the round tables, and because the dining room can be crowded, they have asked that we don't try to fit more seats at those tables. You may join the round tables on a first-come first-served basis. You may find it's easiest to come early and eat breakfast before the round tables begin, to cut down on the distraction of getting up for seconds and also risk losing your seat in the middle of a lively discussion.



Know-how Round

Sunday, June 27

New Ideas for Direct Mail

Direct mailings can be redundant and boring. Sharing ideas to breathe new life into this activity is the goal of this session.

Leader: Éné Gaines

Organizational Barriers to Fund Raising

The very structure of an organization can limit fund raising potential. Be prepared to discuss how different forms of organizational architecture can create benefits or pitfalls.

Leader: Joel Hass

What's a Board For?

Is your board a delight or a disaster? This session will discuss the governance function and how to divide board and staff responsibilities.

Leaders: Glen Cosper and Ken Turpen

Relationship Building: Moving from Talk to Action

Many relationship building programs are haphazard. This session focuses on how to form goal-driven, results-oriented programs.

Leader: Joe Orsak, FAHP

Let's Have a Special Event! (Let's Jump Off a Bridge!)

Special events: If you don't have one, should you? If you do have one, should you?

Leaders: Rebecca May, Mary Anne Chern

Selecting Fund Raising Consultants

Selecting a consultant can be the best or the worst decision you make. The discussion will center on how to find and hire the best consultant for your needs.

Leader: Carolyn Hamilton

Monday, June 28

What's a Strategic Plan and Do I Need One?

Strategic planning, and why it's needed are broadly misunderstood in fund raising. The discussion will focus on both the strategic planning function and process.

Leader: Karen Johnson

This Job is Killing Me!

How do you know when your work environment moves from invigorating to insidious? Share your experience on how to tell the difference.

Leader: Mary Jane Mapes

Gift Clubs: What Do Donors Think about Them?

In today's more jaded environment are gift clubs still effective? Participants will discuss how gift clubs can be moved from clerical nightmares to gift producers.

Leaders: Elaine John and Linda Skinner

Donor Communications: What Do You Want to Say Today?

Is your organization superbly communicating the wrong things? The discussion will center on how to meet donor's needs, rather than institutional needs.

Leader: David Kinsey

I Can Do it Myself!

What are the fundamentals for making a one-person shop successful? Participants will share ideas about flying solo and will discuss criteria for staff additions.

Leader: Jackie Bragaw and Patsy Wagner

Major Gift Prospects in Asia

Understanding the world economic climate means knowing what's happening in Asia. Understanding the Asian mind-set is key to fund raising in this important area.

Leader: Terry Farris

POW-WOWS

Tables

Tuesday, June 29

Forming an Allied Professionals Support Group for Planned Giving

Financial professionals can be a vital extension of the planned giving team. The discussion will center on how to plug in these powerful volunteers for top results.

Leader: Bob Hoffman

Today's/Tomorrow's Donors: What Moves Them?

"This is not your father's Oldsmobile," the ads say. Things have changed. But how? The group will explore what donors' concerns are, and to how best respond.

Leader: Brooke Sadler, CFRE

Let's Get a Grant!

Lots of folks talk about getting grants, but far fewer actually end up getting them. This group will discuss what it takes to get a foundation's attention and how to build a long-term grant program.

Leader: Albin Grohar

"Outsiders" Want to Help. Should We Let Them?

Putting the locals to work as fund raisers is risky business some say. Does turning outsiders into insiders have a place in Adventist philanthropy.

Leader: Chris Murray, CFRE, CSPG

Getting Caught in the Web

Is getting caught in the web a good thing or just a waste of time? The discussion explores advantages and disadvantages of an on-line presence.

Leader: Jeff Scoggins

How Are We Doing?

Determining your organization's level of fund raising performance is important. It's also tricky and time consuming. This session explores what you need to know about benchmarking.

Leader: LuAnn Davis, CFRE

About the Leaders

Jackie Bragaw, Director of Development, Enterprise Academy

Jackie Bragaw has spent her career in philanthropy in one-person shops. In the six years she has been at Enterprise Academy the annual amount raised has tripled and endowments have increased by \$500,000.

Mary Anne Chern, FAHP, ACFRE, President, White Memorial Medical Center Charitable Foundation

Mary Anne Chern has 20 years of experience in fund raising. She is the author of a book on direct mail, serves on the AHP board of accreditation, and is a member of the Milton Murray Foundation board of directors.

Glen Cospers, Manager, Development/Foundation, Metroplex Hospital

Glen Cospers' career includes 17 years in higher education as a vice president for advancement. He's presently on the NSFRE national committee and delegate assembly. Glen also holds volunteer leadership posts in Campfire and American Red Cross.

LuAnn Davis, CFRE, Vice President for Advancement, Union College

At PSI LuAnn Davis taught colleges and academies how to justify budgets and report results. LuAnn's current focus at Union College is to complete a \$5 million campaign while also serving as a board member for PSI and the Milton Murray Foundation.

Terry Farris, Executive Director of Development, Hong Kong Adventist Hospital

Terry Farris built the student-run phonathon at Pacific Union College and started a parents' organization before moving to the major gifts area. He has also been the director of development for the Colleges of Health Sciences at the University of Hawaii. Currently he is executive director of development for Hong Kong Adventist Hospital.

Éné Gaines, Director of Development, School of Nursing, Loma Linda University

When Éné Gaines began at Loma Linda University she had the opportunity to build annual funds for the Schools of Nursing and Allied Health. As the annual funds grew the program expanded to major gifts and she moved full-time to the School of Nursing. There she built the program from \$200,000 a year to \$1.2 million. She and her husband Chris have just begun serving at Campion Academy.

Albin Grohar, Executive Director, Office of Advancement, Loma Linda University

Albin Grohar has been in fund raising and grantwriting for more than two decades. His work experience with foundations and corporations is considerable, principally benefiting private higher education and healthcare.

Carolyn Hamilton, President, Hamilton & Associates

Carolyn Hamilton is one of the leading philanthropy consultants in the Seventh-day Adventist Church. For 15 years, she has served as a consultant to many education, healthcare, and social service institutions. Because of her deep passion for families and children her family founded a shelter for homeless families in Loma Linda, California. She continues to make volunteering a priority, such as chairing the 1999 eighth Conference on Philanthropy.

Joel W. Hass, President, Florida Hospital Foundation

In his role as president of the Florida Hospital Foundation Joel Hass established Vision 20/20 for a \$1 billion foundation to support program developments for Florida Hospital. Before joining Florida Hospital Joel was president and CEO of Central Texas Medical Center in San Marcos.

Bob Hoffman, Donor Relations/Planned Giving, St. Helena Hospital Foundation

Robert Hoffman has directed the planned giving program at St. Helena Hospital since 1994. He has recorded \$6 million in planned gifts and bequests and established the hospital's reputation as the preeminent source for charitable planning information in the Napa Valley through the Allied Professionals Network.

Elaine John, Executive Director, St. Helena Hospital Foundation

Elaine John has been at St. Helena Hospital in the Napa Valley since 1991. Under her leadership the St. Helena Hospital Foundation has significantly increased annual support for the hospital and is currently building an endowment to ensure future funding.

Karen Johnson, CFRE, Vice President for Advancement, Walla Walla College

Karen Johnson learned the importance of planning in her 18 years in the field of education. When she came to Walla Walla College eight years ago she instituted the planning process for the advancement office. She has also taught a number of seminars on strategic planning. She further uses those principles as president of the Milton Murray Foundation for Philanthropy and as a PSI board member.

David J. Kinsey, Grantwriter, Office of Advancement, Loma Linda University

David Kinsey's background includes leadership in marketing, strategic planning, public affairs and development. He was VP/public affairs and development at Kettering Medical Center, and VP/administration for Morton Plant Mease Foundation in Tampa Bay.

Mary Jane Mapes, President, Mary Jane Mapes & Associates

Mary Jane Mapes helps people develop the people skills critical to their success and shows them how to build and maintain lasting relationships. She is a sought-after convention speaker and seminar/workshop leader.

Rebecca L. May, Director of Alumni Services, Andrews University

During her career at Andrews, Rebecca May has planned 13 alumni homecomings, helped with two inaugurations and a sculpture unveiling. She regularly travels with punch and cookies in the trunk of her car.

Chris Murray, CFRE, CSPG, President, Glendale Adventist Hospital Foundation

Chris Murray has more than 20 years of business experience and more than 10 years volunteer and professional fund raising experience. Since joining Glendale Adventist Medical Center in 1994 she has raised almost \$5 million in cash and closed over \$2 million in irrevocable planned gifts.

Joseph V. Orsak, FAHP, President, South Coast Medical Center Foundation

Under Joe Orsak's leadership, South Coast Medical Center experienced its most successful fund raising year in the hospital's 40 year history. He has increased the foundation's assets from \$500,000 to \$11.5 million providing an average of \$1.4 million to the hospital annually for equipment, construction, and programs. Joe also started the first planned giving program, which now has \$7.1 million under management.

Brooke Sadler, CFRE, Principal, Rocking Chair Consultants

Brooke Sadler has more than 20 years of fund raising experience. While president of Florida Hospital Foundation he helped establish the Walt Disney Cancer Research Center and completed a successful \$33 million campaign. Today he serves as consultant to many secondary, higher education, and healthcare organizations.

Jeff Scoggins, Communication Coordinator, Philanthropic Services for Institutions

Jeff Scoggins has been communication coordinator for at PSI since 1993. He is editor of *Philanthropic Dollar* and he built and manages PSI's web site.

Linda Skinner, Director of Development, Union College

Linda Skinner has worked in advancement at Union College for over 14 years and enjoys the challenges of development and camaraderie with alumni.

Ken Turpen, CFRE, Director, Philanthropic Services for Institutions

Ken Turpen has raised major gifts for programs for Adventist education and healthcare totaling more than \$4 million. He works with church leaders, hospital administrators, and college presidents to develop strategies to further philanthropy in the Adventist church.

Patsy Wagner, Development Director, Project PATCH

Patsy Wagner has spent her whole career in one-person shops. For 10 years at Dakota Adventist Academy Patsy raised more than \$2 million for education. During her first year at Project Patch she raised \$947,000.

The
Ministry of
Philanthropy

Section 3

1999 Conference on
Philanthropy



Showcase of Ideas

Showcase 7 Goals



Pre-Phonathon Promise

Walla Walla College

Objectives:

- Raise money for the annual fund.
- Save people the trouble of being called since they are already receiving so many telemarketing calls.
- Reduce the number of calls we had to make.

Execution:

- The plan was executed much the same way as any pre-call letter. The difference was we gave them the opportunity to give now and not be called later.

Cost:

- N/A

Results:

- From 1996, the first year we did the letter this way, the income has grown from \$41,000 to \$68,000. The number of donors has risen from 577 to 603. Gift upgrades this last year were 30 percent to downgrades being 12 percent of the total.

Publicity:

- *Philanthropic Dollar*



June 10, 1999

COLLEGE ADVANCEMENT

Mr and Mrs Edward Ammon
836 N Sentry Dr
College Place, WA 99324-4002

Dear Edward and Julie,

Life throws some quirky twists, doesn't it? This past year my wife, Cherie, and I experienced another burst of the unexpected.

Back when we were students at Walla Walla College we met in the College Church. We ventured our first kiss at Whitman Mission. We skipped a few classes to laze on the plush campus lawn during spring quarter. Eventually, we even got married in College Place. (But no, we did not stay here for our honeymoon. For that we got out of town; we went to Wallula!) Now, twelve years later, we are back in the same church on the same campus where we met.

Returning to the College Church this year to serve on the pastoral staff has been a dramatic life change for me. Yet I am discovering things around here haven't changed all that much. Students still fling grapes at each other in the cafeteria. Dr. Dickinson still commands the attention of an audience when he speaks. And yep, kids still come here and discover God. (Don't believe all the rumors.) This is still a place where friendships are forged, rich memories are made, and spiritually defining moments occur.

That's why I'm writing to ask you to join me in supporting the annual phonathon so these WWC memories can be a reality for students who otherwise couldn't afford this experience. When you support the phonathon you help purchase books for students, provide student scholarships, and buy lab equipment.

While the investments pledged during the phonathon comprise a significant and necessary part of the college budget, our administrators have opted for another way for alumni to contribute other than through phone calls. In my mind, telemarketing phone calls rank somewhere between canker sores and taxes. I suppose they are a part of life, but there is a better option. This year instead of waiting for a phone call you can give now with the enclosed pledge card and business reply envelope. If the college receives your pledge card by October 4, 1998, you will not be called this year.

Won't you join me in making a contribution to help a worthy student? Also, please keep an eye out for students who would like to attend WWC but think they can't afford it. Thanks to donors like yourself, the college can accept many students who didn't think a Christian education was financially feasible.

Sincerely,

Karl Haffner, Senior Pastor
Walla Walla College Church

509/527-2631 • 509/527-2398 FAX

WALLA WALLA COLLEGE • 204 SOUTH COLLEGE AVENUE • COLLEGE PLACE, WA 99324-3000

Persuasive Presentation

Southern Adventist University

Objectives:

- To present to our board the goals and objectives of a new capital campaign and secure their vote of support.

Execution:

We did a show-stopper presentation of music, skits, presentations, and active participation. The plan evolved via a committee of development and public relations people with the intention of getting a "wow" reaction. About 25 people were involved with the presentation.

Cost:

- \$1,200

Results:

It worked. The board voted unanimously to approve the campaign. Their vote was cast with a signature of a "Charter of Commitment."

Publicity:

We are trying to hold a lid on the publicity as we go into the quite stages of the campaign.

Millennium II

As declare our support of Millennium II: Our Campaign for Southern

Robert Wilson

Camel W. Whiffner

57.0 h.h.

William A. Brown

John W. Hall

Dear Sir,

Henry & Company

April 26, 1999

Stackin' 'em up: Tier's, T's & Vegeburgers

Union College

Objectives:

- To create an incentive program which entices students to initially participate in the phonathon (i.e., better recruiting process).
- To help callers identify goals for themselves, specifically in terms of increasing their numbers of new donors, first-time donors, and recaptured donors.
- To increase the amount of pledge dollars that student callers raise.
- To benefit from calling skills that develop over time by encouraging callers to work five or more nights during the phonathon.
- To maintain the callers' interest and dedication to the project even toward the end of the phonathon when pledges are few and far between.

Execution:

Development created a "Stackin' 'em up with the Union College Phonathon" theme, including a "Bonus Bonanza" incentive system. A large, multi-layered veggie burger was created for a bulletin board with three levels for paid student callers to work through. As students worked through levels, their picture was appropriately placed on the bulletin board for all to see. Each level required student callers to raise either a *certain amount of pledge dollars* or obtain an equitable *number of donors* (from specified pledges).

Prizes ranged from free school supplies (level 1) to a free Union College T-shirt (level 3). Many prizes were given by local businesses, and a few were purchased from the Union College bookstore.

In addition, student callers were rewarded .50 cents for every first time donor, .50 cents for every recaptured donor, and \$20 for working five nights (20 hours) of the phonathon. Special events and prizes were given to maintain caller motivation and enthusiasm. For instance, a golf night provided callers with an opportunity to putt for a free video coupon after earning \$100 in specified pledges.

Cost:

- \$645

Results:

The total dollar value of merchandise coupons and prizes given by local businesses yielded approximately \$350 in gifts-in-kind. Nearly thirty callers participated in a three-week phonathon during September and October with fourteen callers working at least twenty hours or five night of the phonathon. Nine callers reached level three (\$2,500 in pledges or greater than 60 donors), seven callers reached level two (\$1,500-\$2,499 in pledges or 46-60 donors).

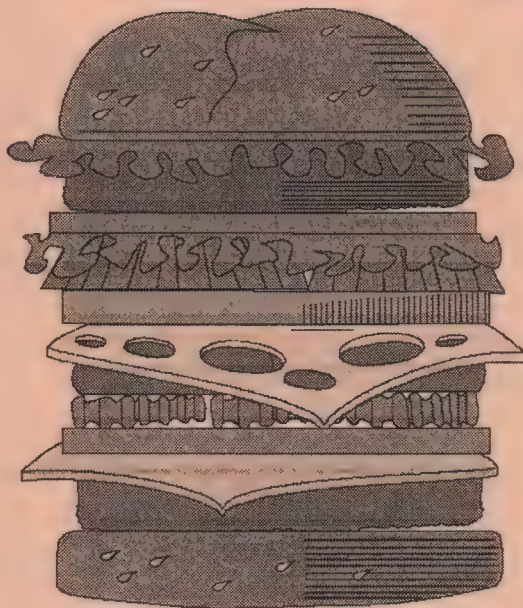
As of May 31, 1999 more than \$194,500 was raised from the phonathon. Callers gained 346 recaptures and 520 new donors, an increase which may be attributed to the caller incentives program.

Publicity:

N/A

**"Stack" Your Earnings With The
UC Phonathon '98
BONUS BONANZA**

Wanda Hilton, Ed.D.
Union College



Level 1

**\$1,000-1,499 In Pledges
Or 30 - 45 Donors**

***Receive Free School
Supplies**

Level 2

**\$1,500-2,499 In Pledges
Or 46 - 60 Donors**

***Receive Free Coupons
From Local Businesses For
Various Merchandise and
Food.**

Level 3

**\$2,500 Or More In Pledges
Or Greater Than 60 Donors**

***Receive a Free Union College
T-Shirt**

Plus: Receive extra dollars for perfect attendance,
first time donors, and recaptured donors.

Worthy Student Funds

Highland View Academy

Objectives:

- Raise \$180,000 for worthy students
- Create an interest and level of support among alumni
- Encourage conferences, churches, and constituents to support
- Showcase pastor's involvement

Execution:

With the spiraling cost of Christian education and the added financial challenge of dorm fees, the administration of Highland View committed to a major worthy student fund campaign for this year to assist approximately one third of the students. Our annual phonathon funds were committed to the project with pre and post visits scheduled. Callers were linked by professions, committees, or churches.

Established in 1968, Highland View has a small database of only 1,200 alumni. So we combined it with the conference database of 5,000 names to increase our contacts and donations. Matching donors were lined up to put on the announcement board each day to encourage callers and donors. More than 40 volunteers and students manned the phones for the five-day event.

We made a special appeal to pastors to encourage their church boards to support the program with gifts of \$1,500 that would be matched by donors.

Annual phonathon goal—\$40,000 Visitation goal—\$140,000

Cost:

- Event materials—\$1,191
 - Phone & postage—\$1,500
 - Postcards—.15 each
 - Thank yous (cards, flowers, gift baskets)—\$2,000
 - "Chesapeake Minister's Plant the Seeds of Christian Education" buckets—\$8 each
- Total cost—\$6,059

Results:

We raised more than \$200,000 for worthy students and have created a solid support base with the alumni, constituents, and pastors for next year. The phonathon itself netted \$63,000.

Publicity:

- *Columbia Union Visitor*
- Conference church bulletins
- Conference newsletter



Ringy Dingy...

"Hello..."

"Who is this?"

"Meeeee."

"Me who?"

"Oh, you're so silly. Youuuu knooooow me. Kenji."

"Yes, Kenji can I help you?"

"I sure hope so! My big brother Marc is really cool! He goes to a big school. I'll go there someday when I grow up. At least that's where I want to go. You know— **Highland View Academy**. He does really neat things there. Science junk, Bible skirts, and lots of computer stuff. Whew, those guys are smart!

Well... person on the other end of the phone, I hope you'll remember my brother and his friends when they call you on November 1-5. They do this thing. It's spelled P-H-O-N-A-T-H-O-N. What a BIG name for. "Please, won't you help us?"

Anyway, will you do me a favor? When they call say, "Yes, I'll give a gift to HVA." It would mean awful lots to me and them. Without your help HVA might not be here for kids like me when I grow up, which is taking waaaaay too long!

Psst... by the way, keep this OUR secret. Okay? My brother wouldn't like me messin' in his business. But I sorta figure it doesn't hurt to have Kenji's help, huh?

So THANKS bunches!



Non-Profit Org
U.S. Postage

PAID

Smithsburg, MD
Permit No. 20

Strategic Planning

Mount Pisgah Academy

Objectives:

- Introduce idea and value of strategic planning.
- To include the conference, key staff, and volunteers.
- Create a plan designed to meet the short- and long-term goals with success.

Execution:

Starting with the academy's administrative support and support of PSI and the conference, we scheduled a two-day off-site planning meeting. We reviewed and revised our current mission, goals, and objectives. Then we brainstormed on all areas impacting the academy.

Cost:

- \$1,500

Results:

We created a three-year plan with objectives and people assigned for implementation and follow-up. We have already seen changes stimulated by the retreat. We've planted the seed for planning and strategic thinking and subsequent meetings.

Publicity:

N/A

Preliminary Brainstorming:

Please jot down a few ideas in each area prior to the meeting to help with time and completeness of our meeting exercises.

*Items to be considered/added/changed/improved during the next three years. Place a 1, 2 or 3 next to each item to indicate which year in the plan you think this would be best.

Draw and Retention of Students:

Physical Plant:

Curriculum:

Housing/Staff:

Control Cost/ Tuition:

Service Outreach:

Work/Study Program:

Others:

PLANNING RETREAT AGENDA

Sunday, October 19, 1997

10:00 - 10:30	Purpose and goals of Retreat
10:30 - 12:00	Discussion of Gymnastics Proposals Details
12:00 - 1:00	Lunch
1:00 - 1:30	Review: Current Mission Statement Current Philosophy Statement Current Objectives Current Development Plan
1:30 - 2:30	Brainstorming Three year outlook
2:30 - 2:45	Break
2:45 - 4:00	Review brainstorming and apply prioritizations
4:00 - 4:15	Break
4:15 - 5:15	Brooke Sadler, special guest

PLANNING RETREAT AGENDA

Monday October 20, 1997

9:00 - 10:30	Recap of Plan and Creation of Time Line
10:30 - 10:45	Break
10:45 - 12:30	Plan influence on Marketing/Pit and Constituents
12:30 - 1:30	Lunch
1:30 - 3:30	Cost/Budget Issues as related to Plan
3:30 - 3:45	Break
3:45 - 5:00	Development Plan as outcome to Strategic Plan

* If additional time is needed for the Development Plan we may meet again from 7:00 - 8:00.

The Four Keys

Glendale Adventist Medical Center Foundation

Objectives:

- To educate associated planned giving professionals about the services of Glendale Adventist Medical Center and Foundation charitable giving programs.
- To involve planned giving professionals in Glendale's estate and financial planning seminars.
- To heighten awareness of planned giving in the community.
- To increase credibility/enhance the effectiveness of Glendale's planned giving program.
- To increase potential for receiving planned gifts.
- To create additional ambassadors/advocates in the community.
- To provide substantial long term financial resources for Glendale.

Execution:

The Four Keys was established in 1995 to assist the foundation in presenting programs about financial and estate planning of interest to the community and offering specialized presentations to select groups of individuals about the benefits of charitable tax planning.

The Four Keys represents keys to success in four professional areas with which Glendale Adventist Medical Center Foundation is building mutually beneficial relationships—legal, financial, accountancy, and real estate.

The Four Keys members attend quarterly luncheons where they receive estate and charitable tax planning information as well as information about Glendale Adventist Medical Center.

Cost:

- Staff education, \$5,300
- Consultant, \$30,000 per year
- Quarterly lunches, \$832 per year
- Seminars, no cost
- Newsletter, \$10,000 year

Results:

\$2.1 million (closed) written in charitable trusts. Twenty-two people have indicated that Glendale is named as a beneficiary in their will. Several more planned gifts are in active stages of development with a total potential in excess of \$4 million. Six professional advisors introduced their clients to Glendale.

Publicity:

The Heritage Society, bequest and planned giving recognition society was created to honor, recognize and thank those individuals who have informed us that Glendale is included in their will/estate planning. The Heritage Society newsletter, published quarterly, was created to publicize estate planning success stories. A publication is sent to professionals as well as donors and other selected groups.

Heritage Society members have been honored at the annual gala. Publicity includes press releases, program book, internal publications, with copies sent to various constituencies.

GLENDALE ADVENTIST MEDICAL CENTER FOUNDATION

THE FOUR KEYS PROFESSIONAL ADVISORY COUNCIL

LUNCHEON MEETING

TUESDAY, JUNE 22, 1999, 12:00 NOON

Creating Caring Clients: How Do Professionals Talk to Clients About Charitable Giving?

Presented by

Joseph Lazara, Esq.

Robert C. Osher, Robert Osher & Company

Ralph Quintana II, Prudential

June is the kick-off month for the National Council on Planned Giving's Leave a Legacy Campaign. This program, supported by the four Southern California regional planned giving councils, encourages people to remember their favorite charities in their estate plans, and perhaps, establish some form of planned gift while they are still living.

The Four Keys program will feature a panel discussion with Four Keys members who will discuss their own techniques and experiences in helping clients consider charitable gifts. In addition, highlights of the Leave a Legacy campaign outreach efforts will be presented. Be prepared, your clients may be asking you about this!

The future of our community not for profits and healthcare providers like Glendale Adventist Medical Center will hinge increasingly on the gifts of donors like your clients. We hope that you will join us for this informative program.

Please Join Us!

Invite Your Client(s) To Be Your Guest(s)!
This Program Will Be Very Informative!

The Four Keys Luncheon Meeting
Tuesday, June 22, 1999
Glendale Adventist Medical Center *Board Room*
1509 Wilson Terrace

12:00 p.m. **Lunch**
12:30 p.m. **Program**
1:30 p.m. **Adjournment**

*Please complete and return the accompanying registration form by June 15, 1999.
We look forward to seeing you at noon on June 22, 1999!*

Increasing Sponsorship Revenue from Event Attendees

Loma Linda University Medical Center

Loma Linda University Proton Charity Invitational (golf tournament)

- Each year the event sells out and has an extensive waiting list for players.
- Through 1998, we were limited to 136 players and could not expand.
- To make the tournament more efficient and enjoyable for everyone the number of player spots was reduced to 128 in 1999.
- Several companies were buying one or two foursomes each year, but were not supporting the event through additional sponsorship.

Objectives:

- Maximize income from the limited number of playing spots by getting companies who pay for players to also become sponsors.
- Make up the \$3,600 lost by the reduction of the eight player spots in 1999.

Execution:

Solution: Establish a minimum sponsorship level at which companies could purchase playing spots in the event. Companies who chose not to become sponsors but wanted to send players would be put on a waiting list.

Beginning with the 1998 invitational we added a section to the sponsor packet's "Sponsor Benefits" page that offered sponsors of \$2,500 or more the opportunity to purchase player spots in the invitational. A letter from Dr. Jerry Slater, chair of the invitational's executive committee, explained this change to previous sponsors.

Cost:

No cost

Results:

- In 1998 all three of the companies that had sent players in previous years but had not been sponsors became \$2,500 sponsors in addition to buying one or two foursomes. This brought in an additional \$7,500.
- In 1999 sponsors of \$2,500 or more accounted for 10 more player spots than in 1998. This brought in an additional \$7,500 in sponsorships from three companies.

Publicity:

N/A

Contact: David Colwell, Director of Development, Loma Linda University Medical Center, P.O. Box 2000 A607, Loma Linda, CA 92354; 909-558-4778.



Department of Radiation Medicine

Loma Linda University Medical Center

P.O. Box 2000
Loma Linda, CA 92354
(909) 824-4277

March 4, 1998

NAME
ADDRESS
CITY, STATE ZIP

Dear NAME:

Thank you again for your commitment to advancing proton therapy cancer research - especially through your sponsorship of the Proton Charity Invitational.

With support received during the Invitational's first seven years, the Loma Linda University / Ken Venturi Proton Therapy Cancer Research Endowment has surpassed the \$1 million mark. The interest earned from this fund is helping to conduct vital cancer research so even more people can benefit from the proton therapy program here.

Along with this success has come an increased interest in the event itself. As you may know, the playing spots for last year's Invitational filled fast, creating an extensive waiting list. To maximize the limited number of playing spots at the Morningside event, we are making a change in the foursomes available for purchase.

Since the Invitational is a fund raiser to benefit cancer research and our major sponsors are key to this effort, corporate sponsors of \$2,500 or more will have the opportunity to buy player spots in the Invitational. This special benefit is outlined on the enclosed "Sponsor Benefits" sheet. I trust you understand this and can appreciate our situation.

We look forward to your continued participation and to another great day of golf at The Club at Morningside on Monday, May 18.

Sincerely,

Jerry D. Slater, MD, Chair
Invitational Executive Committee

SPONSOR BENEFITS

9th Annual Loma Linda University Proton Charity Invitational

May 17, 1999

Benefits	Platinum \$25,000	Gold \$15,000	Silver \$10,000	Bronze \$5,000	Patron \$2,500	Benefactor \$1,000	Friend \$500
Name/Logo on all Invitational printed material and advertising	Name & Logo	Name	Name	Name	Name		
Name on display at Invitational registration	Yes	Yes	Yes	Yes	Yes	Yes	
Name/Logo in Invitational program	Logo	Logo	Logo	Logo	Logo	Name	Name
Opportunity for additional recognition on Invitational items	Yes	Yes	Yes	Yes	Yes		
Foursomes in Sponsor Kick-Off Tournament on Sunday, May 16	Two	One	One	One			
Complimentary player spots in Invitational on Monday, May 17	One Foursome	Two Spots	One Spot				
Opportunity to purchase player spots in May 17 Invitational	Yes	Yes	Yes	Yes, up to 8 spots guaranteed	Yes, up to 4 spots guaranteed		
Commemorative Gift	Yes	Yes	Yes	Yes	Yes		
Name on LLUMC Donor Wall	Ambassador Level	Patron Level	Patron Level				

Prayer Breakfast

Loma Linda Academy

Objectives:

- To create a spirit of partnership with pastors in working for our children.
- To establish a group of "Prayermedics" who would pray often for the success of the school.
- To affirm pastors and express appreciation for their support of the concept of evangelism through education.

Execution:

- Earlier in the year we asked the pastors to reserve a certain date for this event.
- An invitation was designed and sent to each constituent pastor.
- Led by the development and public relations director, the program was designed and the meal ordered.
- Pastors were called a week before the event to determine if they would attend.
- Students assisted in presenting the program.
- The breakfast was done in an elegant setting.

Cost:

- \$350

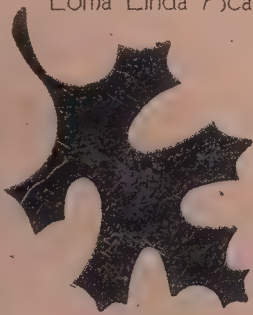
Results:

- The pastors expressed delight in being treated with such generosity.
- Church support for our school has remained steady and solid.
- A prayer ministry for our school is being actively done in our churches.
- The work of education and the work of redemption are viewed as mutually inclusive by pastors and educator.
- A greater spirit of trust now exist between church and school.

Publicity:

N/A

Praise and Prayer Breakfast
for
Loma Linda Academy



November 6, 1998
8:30 a.m.

Hosted by
Administration
and
Department of Public Relations

"Let us see with your eyes, O Christ, that we may
see the beauty and possibility of every child."

Join the Church
Prayer Breakfast
on Friday morning, November 6, 1998
8:30 a.m.
Loma Linda Academy
Loma Linda, MD

The Tickler File

Feather River Hospital

Objectives:

- Identify a project for raising funds.
- Organize a method of solicitation.
- Create an awareness of the sales message.
- Meet the fund raising goal.

Execution:

- Obtain a prospect list.
- Mail a project report to ten prospects each day.
- Use a tickler file to organize a call schedule. Contact those ten prospects after three days of the mailing date to discuss the subject of the project report and to ask for close of the solicitation.
- Keep detailed notes during the conversation on 3 x 5 inch cards.
- Make follow up calls to ask for a commitment, again using the tickler file to organize a schedule.

Cost:

- \$25 for supplies.

Results:

- \$265,000—Bob Hope Gala
- \$75,000—Darrell Miller Golf Tournament
- \$175,000—Mini Grand Prix Auto Racing
- \$3,000,000—Capital Campaign
- \$2,000,000—Planned Giving

Publicity:

- Local Community Hospital Foundation recognition
- Received tremendous amounts of publicity in local newspaper

CHOC HOSPITAL

Thomas Jones, President
Nancy Green, Sec.

455 S. Main Street
Orange, CA 92668

997-3000

6-30-92 Race Package
Called Book 7-6-92 Interested
Called Book 7-9-92 Will buy Race Car
C. Hol / Corp
C/O Race



Golden West Zone

Long Beach Area
Area 1 - Long Beach - 714-6212
Area 2 - Long Beach - 714-6212
Area 3 - Long Beach - 714-6212

863-4600

Race!

Randy Baumberger
Marketing Manager

Long Beach Area 714-6212

Called Made 7-6-92 Interested

Called Book 7-9-92 Will buy Race Car

Century Celebration

Walla Walla General Hospital

Objectives:

- To invite the whole community to a special event commemorating our hospital's 100th birthday.
- To create awareness of our organization and show our involvement in the community.

Execution:

A committee of 16 hospital employees planned and coordinated the event under the direction of the hospital's director of development and director of marketing. Our goal was have a unique event that would appeal to a broad audience. To do this our celebration resembled an old-fashioned community fair so guests would feel like they stepped back in time to 1899 (the year our hospital was born).

To accommodate the number of people we hoped would attend (3,000), we held the event outdoors on our hospital campus. Along with hospital departments, local organizations, and restaurants were invited to have food or carnival booths. All booths were old-fashioned and each had a false front (which the committee spent many hours painting) so the campus looked like an old western town. In addition, all staff working in booths wore costumes reflecting the early 1900s. A horse-drawn wagon was used to transport guests from the parking area to the activity areas. We also had parking attendants on horseback and a band of vigilantes who provided security as well as entertainment.

Entertainers performed on a main stage and also among the crowds (barbershop quartet, jugglers, clowns, blue grass band, Victorian fashion show, community band, Sweet Adelines, etc.) We also held a pie eating contest and a raffle to win a Victorian gazebo. During the five o'clock hour we had a giant birthday cake parade complete with marching band and hospital officials riding in antique cars and wagons.

To encourage attendance we gave away several items such as T-shirts to people born at the hospital, straw hats, toys, birthday cake, and lemonade. The event concluded with a fireworks show.

Cost:

Approximately \$37,000. (We solicited more than \$30,000 in cash and in-kind gifts to sponsor the event).

Results:

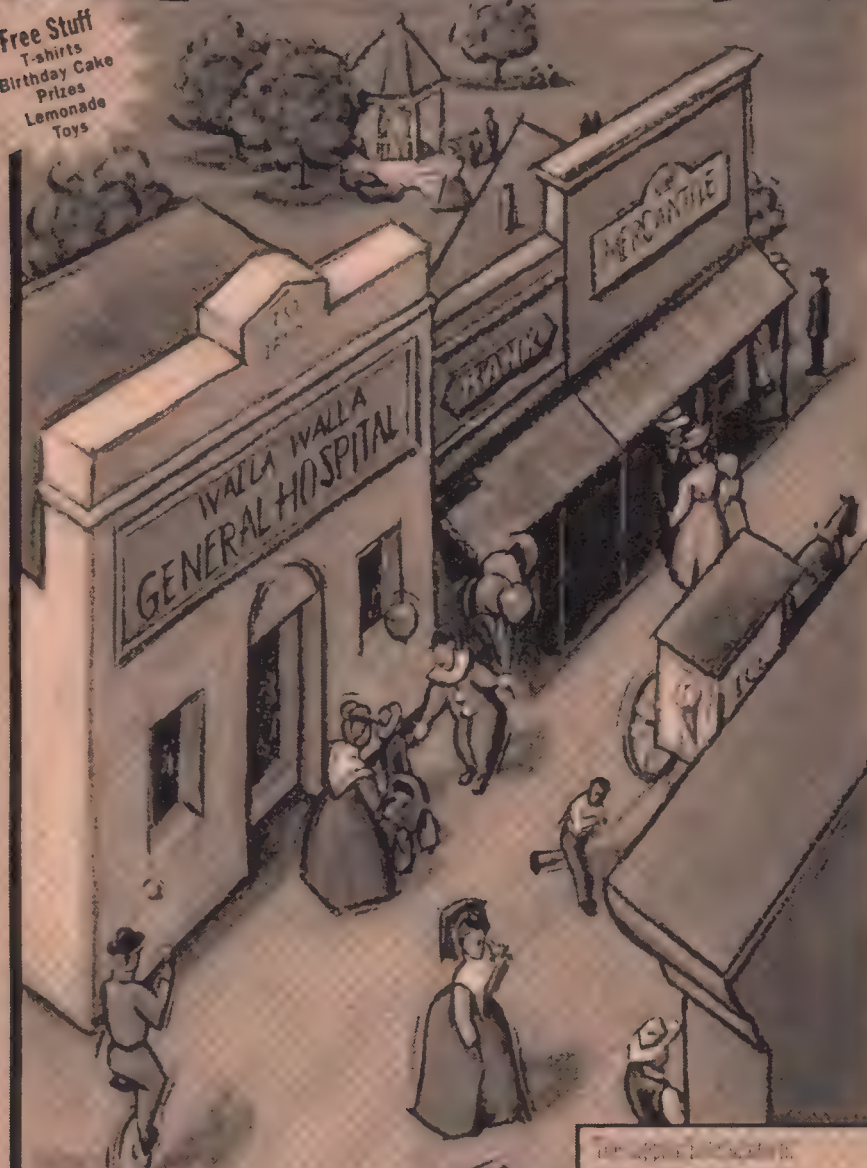
More than 7,000 people attended (we had hoped for 3,000). People told us our event was more fun than the community's fair and the annual hot air balloon festival.

Publicity:

- We did extensive publicity before the event including advertising on radio and television, posters, full-color ads in the newspaper, including a special commemorative insert on the day of the event, a direct mail piece sent to every household in the community, and personal invitations to board members, major donors, and VIPs.
- We received a half-page article (including color pictures) in the local newspaper before the event.
- We also had a cover article in the local entertainment newspaper. There were no pictures or articles in the newspaper after the event, which prompted many community people to call the newspaper and complain.

CENTURY CELEBRATION

Free Stuff
T-shirts
Birthday Cake
Prizes
Lemonade
Toys



CREDIT BUREAU OF WALLA WALLA, INC.
MONTANA VIEW FUNERAL CHAPEL, INC.
CRAN LUMBER COMPANY
FALCON CABLE
J & J CONSTRUCTION
NORTHWEST COLLISION

SPONSORED BY THE COMMUNITY OF WALLA WALLA
COMMUNITY CENTER, 1000 1/2 3RD AVE. S. WALLA WALLA, WA 99151
Phone: (509) 565-1111

June 6, 1999
3-10 p.m.
Walla Walla
General Hospital

Join us in celebrating the
100th birthday of Walla Walla
General Hospital by stepping
back in time to 1899. We're
transforming the hospital
grounds into an old-fashioned
fair and the whole community
is invited.

Family Fun

Strut down a recreated old-time Main Street where the music and costumes have been brought to life in new tops and bustle dresses. Try your aim at the dunking booth, impress your friends at the pie-eating contest or join a sidekick to the finish line in the gunnysack race.

Enjoy wagon rides, old-time photos, penny toss, the fun shadow box, face painting, train show, the dunking tank, relay races and much much more.

Mouth watering Food

Pie your path with homemade favorites provided by local organizations and the following restaurants:

- Mainstreet
- Pangeo
- Salsita's
- Stone Soup
- John's Wheat and Bakery

Pizza, pasta, soup, sandwiches, Mexican food, salads, burgers, shakes, hot dogs, chili, fries, strawberries, chocolate, pie, root beer floats, ice cream, popcorn, shaved ice. Indulge in bread, cotton candy and more.

Street Entertainment

From the world-class of the show to the traditional of Indian dancers, everywhere you turn other performers will entertain you. Just don't get on the wrong side of Freddie Blass and his gang of vampires.

Birthday Cake Parade

Depress the giant birthday cake. Parade it in pie. There will be more cake and lemonade for everyone.

Free T-Shirts

If you were born at Walla Walla General Hospital, celebrate your day by wearing a free T-shirt. Community because we're here. 100th birthday!

THE SCHEDULE

- 3:00 p.m. Walla Walla Community Band
- 3:30 p.m. Pie of Chai, juggling and magic
- 4:15 p.m. Walla Walla Valley Chuggers
- 5:00 p.m. Birthday Cake Parade
- 6:00 p.m. The Eve Green String Band
- 6:45 p.m. Victorian Fashion Show
- 7:30 p.m. Small Animals
- 8:15 p.m. Shuttle One, award-winning harbor show concert
- 9:00 p.m. Sam & Sister Jeffers, Grand Ole Opry performers
- 10:00 p.m. Fireworks

Adventist
Health

Walla Walla
General Hospital

How to Establish a President's Circle

Andrews University

Objectives:

- Develop closer ties to Andrews University of major donors.
- Generate greater loyalty.
- Provide a think tank for the president.
- Communicate financial needs of the university.
- Increase philanthropy.
- Identify volunteers willing to serve Andrews University.

Execution:

- Asked key friends of Andrews University to establish a President's Circle.
- Accessed key friends and supporters of university.
- Provided the opportunity for them to meet with the president twice a year.
- Volunteers selected projects to fund and topics to discuss.

Cost:

- No cost. Members paid dues or made special contributions.

Results:

- Greater participation of alumni and friends.
- Tangible projects were initiated (piano).
- A noticeable increase in giving.
- Additional interest in estate planning.
- Educational forum on higher education started by members.
- Funds provided for student hospitality meals and campus ministry.
- Volunteers initiated various projects.

Publicity:

- Articles in Andrews University *Focus* magazine.
- Personal testimonies of key friends to others.

Major Gifts

Florida Hospital

Objectives:

- Obtain exposure to the 30 percent Hispanic community population in Central Florida.
- Build relationships with Hispanic physicians, business professionals, and community leaders.
- Establish relationships with the Hispanic media.
- Secure major gifts, corporate sponsorships, and deferred gifts.
- Establish long-term partnerships.

Execution:

- Participation in the Hispanic Chamber of Commerce and local community events.
- One-on-one visits to community leaders and professionals.
- Cultivating prospects and motivating them to be part of Florida Hospital Foundation by inviting them to be a part of our fund raising boards.
- Inviting prospects to participate as a corporate sponsor in our foundation special events.

Cost:

- Ten percent of the total goal of the development officer assigned to the Hispanic market.

Results:

- Recognition award in the service area for the development officer assigned to the Hispanic market.
- New board members from various professional backgrounds.
- New corporate sponsors for special events that can later be cultivated for major and deferred gifts.

Publicity:

- Recognition among the Hispanic community.
- Positive word of mouth from new board members and corporate sponsors.
- Press releases announcing the Hispanic Achievement Award in the community's print media.

The
Ministry of
Philanthropy

Section 4

1999 Conference on
Philanthropy



BI

Flashback to 1996



Flashback

to the
1996 Conference on Philanthropy



Dionne McDonald and Scott Winters and back up artists, Alyssa Morel, Robb Crouch, and Éné and Chris Gaines, rap their praise of the STEP/UP program during the opening of the 1996 Conference on Philanthropy.

You can tell that Don Wildman and Joel Hass are already looking forward to the 1999 conference.



Brenda Pooley, Jeff Swanson, and LuAnn Davis can't quite decide among themselves whether to preach, pledge allegiance, or applaud.

We are more than fund raisers, said Doug Lawson. We are professional philanthropists.





Marc Selivanoff looks like he makes a great dinner act as he entertains Don Prior, Reiner Roeske and his wife, Albin Grohar, and Jeff Swanson.



Judging by the high marks on the evaluation forms it seems Albin Grohar's audience enjoyed the presentation as much he enjoyed giving it.



Congratulations from the Milton Murray Foundation. Karen Johnson make a presentation to Sheree Parris Nudd.



Charles Scriven, Henry Berkner, Fordyce Koenke, and Milton Murray look busy, but they're probably talking about the conference center's fantastic lunch buffet.



Art Frantz, Milton Murray, and Buck Smith—three of original movers and shakers of the beginnings of philanthropy.



Winton Beavon presents Jack McClarty with the 1996 Trailblazer in Philanthropy award.



Milton Murray presents with his customary energy and depth.



Michelle Oetman, Robb Crouch, and Patsy Wagner are—um—well, what can we say?



David Faehner really gets into the music at the Conference on Philanthropy!



LuAnn Davis: "Put your right hand in, put your right hand out..."



Talk about networking opportunities!



The
Ministry_{of}
Philanthropy

Section 5

1999 Conference on
Philanthropy



BI
Speaker Bios & Notes

Meet the Speakers

Edward Ammon, CFRE



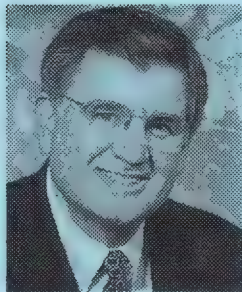
Ed Ammon has served for eight years in the advancement office at Walla Walla College, two years as development assistant and the last six years as

the director of annual giving. Prior to coming to the advancement office, he served five years as a men's dean at Gem State Academy, San Pasqual Academy, and Walla Walla College.

In his present position, Ed has raised more than \$6 million through annual and capital gifts. He has a General Conference Trust Certification for planned giving and he won the CASE Rising Star Award in 1997. Ed holds majors in Religion and Communications from Walla Walla College.

Ed is currently the president-elect of the Walla Walla Chapter of the National Exchange Club and is a city councilman for College Place, Washington.

Bob Andringa



Bob Andringa earned three degrees, including a Ph.D. in higher education administration from Michigan State University. His career includes serving

as staff director of the Education and Labor Committee U.S. House of Representatives; director of policy for Governor Al Quie in Minnesota; executive director of the Education Commission of the States, based in Denver; nine years as a private consultant working with more than 100 nonprofit boards and CEOs; and, since 1994, as president of the Council for Christian Colleges & Universities, an association of 125 campuses in 11 nations, based in Washington, D.C. On a limited basis, he also does board development workshops for colleges and other Christian ministries. Bob and his wife of 36 years have two grown sons.

BIOGRAPHIES

The
Ministry of
Philanthropy

Jackie Bragaw



Jackie Bragaw has spent her career in philanthropy in one-person shops. In the six years she has been at Enterprise Academy the annual amount raised has tripled and endowments have increased by \$500,000.

Enterprise is the first place Jackie has raised money. In the six years she has been at there the fund raising program has gone from \$107,000 the first year to \$360,000 this year and the numbers are still climbing! Endowments have gone from \$1.3 million to \$1.8 million to date. In three years, major gifts at Enterprise have gone from four gifts to 33 gifts. Jackie won the Map Home Run Hitter award the first year of the Model for Academy Program.

She gives all the credit and glory to God and says that God is the best development director any school could ever have.

David K. Burghart, CFRE



David's career in development began in 1986 while teaching music at Rio Lindo Adventist Academy. In 1990 he made a career move to full-time development and became the oldest STEP/UP in PSI history. In 1992 he joined the development staff at Andrews University as

associate director of development for major gifts. He helped Andrews establish a major gifts program and traveled extensively, visiting donors, and experiencing the joy of building donor relationships. A carry-over from his music years, he views fund raising as an art form—like developing a symphony.

In 1996, David became director of development for Andrews University. During this time they began a major capital campaign with a goal of \$13 million. The campaign for Andrews was well on its way to completion when he accepted an offer to join the administrative team at Southern Adventist University as vice president for advancement. He is currently laying the ground work for Millennium II—The Campaign for Southern, with a goal of \$21 million, which will focus on a menu of endowments and building projects.

Corina Car



Corina is the director of marketing at Walla Walla General Hospital. She holds a bachelor of science in business administration with a concentration in marketing from Walla Walla College.

She is a member of the Walla Walla Exchange Club, the American Marketing

Association, and recently taught "Principles of Marketing" at Walla Walla College.

Previously, Corina worked as project coordinator for Walla Walla College's office of college relations where she received the CASE Silver Award for the college's annual report.

Originally from Argentina, Corina and her husband, Robert, moved to the United States in 1990. Since that time they have settled in College Place and enjoy gardening and traveling—especially back to Argentina for family gatherings.

Christopher Carey, CFRE



Chris Carey, director of corporate and foundation relations, co-directs the development office at Andrews University. A former PSI STEP/UP has earning a dual degree in business administration and public relations, and has conducted successful

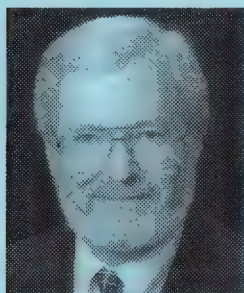
phonathon, annual fund, major gift, and grantsmanship programs.

Carey feels his varied experiences and interests complement his work—from construction worker, college newspaper editor, and former mission volunteer in Japan to successfully starting and operating a small business. Volunteer activities include directing a children's division at Pioneer Memorial Church; alumni board vice president, Wisconsin Academy; fund raising consultant to Valley View University, Ghana, West Africa; and the United Way of Southwestern Michigan.

Carey enjoys horticulture, construction, ceramics, architecture, and reading children's books. He is married to Setsuko and they have one daughter, Misato. Victoria, their miniature pot-bellied pig is also considered family.

CFRE, member of NSFRE, CASE, and Martins Supermarket Savers Club.

Cyril Chern, CFRE



Cyril Chern is a registered architect and an attorney. As an architect, he is the past President of the Los Angeles Chapter of the American Institute of Architects and has served as the Secretary of the California Council of the American Institute of Architects.

Cyril has won many awards, including the Marble Institute of America Design Award and the Southwest Timber Association Design Award. He has received several American Institute of Architects awards including the prestigious Presidential Award. Awards and commendations from the Mayor of Los Angeles, the Los Angeles City Council and the Los Angeles County Board of Supervisors, the California State Assembly and the State Senate have additionally honored him.

As an attorney, he is admitted to practice before the United States Supreme Court, the United States Tax Court in Washington, D.C. and New York, among others.

Over the past twenty years Cyril has taught and lectured in the United States and abroad in the areas of planned giving, charitable trusts, international taxation, and related matters. During this period he has been involved in all aspects of tax and estate planning and acts as a planning giving advisor to several corporations and nonprofit foundations in this specialized area of practice.

Mary Anne Chern, FAHP, ACFRE



Mary Anne had been in health care fund raising for twenty years prior to accepting her current position. She is one of only four individuals internationally to have achieved both Fellows status, awarded by the Association for Healthcare Philanthropy, and Advanced Certification,

awarded by the National Society of Fund Raising Executives.

She is the author of a book with the Plenum Nonprofit Management Series and many articles, and she frequently lectures on the subjects of fund raising, marketing, and public relations. She serves on the board of accreditation for the Association

for Healthcare Philanthropy, and is a member of the board of directors of the Milton Murray Foundation for Philanthropy.

Bjarne (Bj.) Christensen



Bj. has been the assistant to the president for administration of the North American Division since 1997.

He began his service with the Seventh-day Adventist Church in 1970 as the youth department administrative assistant in the Southeastern California Conference, while

a student at La Sierra University.

Christensen studied for a year at Newbold College in England and received a bachelor of arts degree in Theology from La Sierra University in 1971. He earned a Master of Divinity degree from Andrews University in 1974. He was ordained a gospel minister in 1977.

Bj. was a pastor and youth director in the Oregon Conference, the vice president for administration in the Potomac Conference, the president of the Illinois and Southern California conferences before coming to the North American Division.

Bj. is married to the former Judi Perkins. They enjoy their daughter, Heidi, a student at La Sierra University.

LuAnn Davis, CFRE



LuAnn Davis, CFRE, is vice president for advancement at Union College, Nebraska. She accepted this position at her alma mater in 1992 returning a decade later to the office where she started her career in philanthropy.

Davis administers the development, alumni, pub-

lic relations, and marketing communication functions at Union College. Accomplishments to date include the successful launch of a \$5 million capital campaign; a revision of the telemarketing program; and the creation of new programs in planned giving, major gift solicitation, annual fund and alumni activities that have worked together to yield positive results in increased philanthropic income, greater alumni participation, and growth of

the college's endowment.

LuAnn is married to Lynn Davis, an art professor at Union College. She enjoys reading, meeting people, music, theater, and sailing.

Chris Gaines



Chris Gaines has worked for ten years in the fund raising arena with stints in the education and healthcare fields. After graduating from Union College (NE) in 1989 with a communications degree he accepted a STEP/UP position at Broadview Academy (IL). In

1992, Chris headed for warmer weather and a future spouse when joining the development team at White Memorial Medical Center in Los Angeles. At "The White" he received valuable experience in events planning, employee campaigns, and grantsmanship.

For the past three years, Chris has served as the director of development for La Sierra Academy (CA) as a participant in the Model for Academy Philanthropy program sponsored by PSI. Responsibilities at La Sierra have included building an educational endowment and improving alumni relations.

Chris has accepted a position to return to his high school alma matter, to become the director of development for Champion Academy (CO). He and his wife Éné and sons Johnny and Garrett are looking forward to seeing the Rocky Mountains on a daily basis, being closer to family and friends, and catching a few Bronco games at Mile High Stadium.

Carolyn Hamilton



Carolyn Hamilton is one of the leading philanthropy consultants in the Seventh-day Adventist Church. For 15 years, she has served as a consultant to many education, healthcare, and social service institutions. Because of her deep passion for families and children, her family founded

a shelter for homeless families in Loma Linda, California. She continues to make volunteering a priority, such as chairing the 1999 eighth Conference on Philanthropy.

Lawrence N. Jones



Dr. Lawrence Jones, a native of West Virginia, retired on June 30, 1991 from the deanship of the Howard University School of Divinity after sixteen years of service. Prior to coming to Howard, Jones had served as dean of students, dean of the seminary, professor of applied

Christianity, and acting president of Union Theological Seminary in New York City. During the period 1960-1965, he was dean of the chapel at Fisk University in Nashville, Tennessee. A former officer in the U.S. Army and a public school teacher. Lawrence has been actively involved in the struggle for racial justice, in many organizations dedicated to improving the quality of life in the communities where he has lived, and has held membership in many professional and religious organization.

He holds earned degrees from West Virginia State College, the University of Chicago, the Oberlin Graduate School of Theology, and Yale University. He has been the recipient of five honorary doctoral degrees. Ordained in the United Church of Christ, he has been pastor to congregations in Ohio, Tennessee, New York, and Washington.

Lawrence continues to be active in his retirement as a researcher, preacher, consultant, and writer. He has a book entitled *They Overheard the Gospel: The African American Religious Experience Prior to the Civil War* which has been submitted for publication. He has completed a small handbook for pastors entitled *How To Do What You Want To Do, When You Don 't Know How To Do It*. He is presently engaged in a project exploring ways in which the gospel can be communicated in ways that do not erode its integrity.

Sean Joyce



Sean Joyce is a Ph.D. psychologist with more than 20 years of speaking and training experience. He conducts more than 200 programs a year, and more than half of those are for return engagements—the highest form of praise for any speaker!

Sean believes that people learn best when they are having fun, so all his presentations are as entertaining as they are educational. He uses magic and play throughout each program to keep attendees attention and to make his points.

He is also on retainer to several private companies to consult with top management and train employees on a wide variety of topics.

Joyce is the author of many books and articles on topics such as stress, team building, assertive management, negotiations, and motivating employees. As a licensed NFL player representative, Sean has negotiated several lucrative contracts for players.

Joyce's new book *The Survey Says* is a compilation of more than 20 self-scoring tests for use in improving employee efficiency as well as for personal pursuits.

Kellie Lind



Kellie Lind holds a B.S. in public relations and journalism from Pacific Union College. She was director of public relations at Pacific Union College from 1991-1994 and is currently director of alumni and development.

As alumni director, Kellie started her fund raising activities by accident while visiting alumni for the college. When she talked to people about the students at the college and the future of Christian education she found that the alumni were interested in supporting the college's students. When an older alum once told Kellie that he wanted to leave his estate to the college her reply was, "Are you sure?"

Kellie's favorite part of fund raising is the first visit—meeting people for the first time, and starting a friendship with them. Kellie's hobbies include teaching entertaining and decorating classes Pacific Union and collecting American pottery from the 30s and 40s. Kellie lives in Angwin, in what she describes as a mens' locker room with her two sons, Christian who is 14 and Carignane who is 12.

Jerry Linzy



Jerry Linzy is senior managing partner and chief operating officer of Jerold Panas, Linzy & Partners—one of the nation's largest firms in the field of campaign services and financial resource development. A major force in the industry, the firm has offices in Chicago, Boston, Sydney, and Melbourne. Since its founding in 1968, the firm has served over 1,400 client institutions. Linzy brings to his position substantial skill and talent. He has over 25 years experience as a senior development officer in major healthcare institutions and higher education.

He has served as an elected official, a member of the board of trustees of the University of Evansville, and president of the University's alumni association. Additionally, he has served as a member of the Corporate Council for Interlochen Center for the Arts. He is also a past chair of the Association for Healthcare Philanthropy (AHP).

Linzy is a regular speaker at seminars and workshops in the United States and Australia and contributes to professional journals. He is associate dean of the AHP Institute Management faculty at the University of Wisconsin in Madison. Linzy is also the dean of the capital campaign faculty for the Institute for Charitable Giving. Organizations he works with will tell you that he is a strategist of considerable proportions and an effective problem-solver. His standards are high and he is dedicated to the success and the best of those he serves.

Mary Jane Mapes, CSP



Mary Jane works with organizations that want their people to grow and achieve higher levels of success with their customers, associates, and team members. She helps them develop the people skills critical to their success and shows them how to build and maintain lasting relationships.

Mary Jane combines a masters degree in communication with her experience as a radio announcer, a goodwill ambassador for the National Cherry Industry, and over 20 years of education and training.

Mary Jane is a past president of her local chapter of the American Society for Training and Development, a past president of the Professional Speakers Association of Michigan, and one of a small number of women nationwide to have earned the prestigious CSP, Certified Speaking Professional, designation granted by the National Speakers Association. Most recently she was awarded the Charles Leadership Award, the highest honor bestowed by the Professional Speakers Association of Michigan.

Mary Jane is author of the book, *The Art of Fielding Questions with Finesse*, an internationally distributed videotape training program, a quarterly newsletter, audio cassette learning albums, and many articles that provide practical solutions for business people problems.

Mary Jane has shared the stage with such notable people as Art Linkletter and author Dr. Bernie Siegel.

Rebecca L. May



Rebecca is director of alumni services at Andrews University. During her career at Andrews she has, among other things, planned 13 alumni homecoming weekends, been involved in two inaugurations, one sculpture unveiling, and lived through staffing the Andrews booth at

two General Conference sessions.

Rebecca graduated from Andrews in 1977 and worked in the public relations office from 1979-86 at which time she moved to the alumni office. Among her accomplishments is raising \$150,000 (with the help of her colleagues) for the J. N. Andrews sculpture on the Andrews campus.

Rebecca also has a lot of experience with phonathons—some good some bad. She has worked with students, faculty, and outside services, and is full of good information on phonathons. Her husband is assistant dean and a teacher at Andrews. They both love being involved in Adventist education.

Rebecca routinely carries cookies and punch in the trunk of her car.

David Morgan



David Morgan joined the Council for Aid to Education (CAE) in 1989 after working as a human resources planning and research officer at Morgan Guaranty Trust Company of New York.

Morgan is responsible for the annual Voluntary Support of Education (VSE) survey and reports and develops

CAE's various national estimates of private giving to education. He has conducted groundbreaking research on corporate charitable giving using IRS data and has over the last decade conducted many other research projects on philanthropy in the U.S. He manages CAE's systems and databases, including new services such as VSE's Data Miner, which is offered over the Internet. He has written and spoken widely on private support of education and corporate contributions to education.

Morgan is a member of the Advisory Council on Methodology for *Giving USA*, the annual report on philanthropy published by the American Association of Fund Raising Counsel Trust for Philanthropy. He serves on an NSF Advisory Panel on Nonprofit Research & Development Activities and the CASE Matching Gift Advisory Council. He did his undergraduate work at Bowdoin College and his graduate work in organizational behavior at Yale University.

Chris Murray, CFRE, CSPG



Chris Murray is president of Glendale Adventist Medical Center Foundation. With over 20 years of business experience and more than 10 years volunteer and professional fund raising experience, Chris Murray has a proven track record of consistent success. She has personally been involved in

helping raise millions of dollars of outright and deferred charitable gifts, providing the know-how and sharing the experience.

Chris began her business career with a well-known personnel service firm where she directed the Southern California operations for 12 years and was administrative director and director of development for Glendale Memorial Hospital for several

years.

Since joining the Glendale Adventist Medical Center team as president of the foundation in 1994, Chris has raised almost \$5 million in cash and secured over \$2 million in irrevocable planned gifts. Under her leadership and with support of her 40 member board of directors, Murray successfully transitioned the board from a special events focus, to an innovative major gifts/planned giving focus building larger assets.

Jerry Panas



Jerold Panas is executive partner and chief executive officer of Jerold Panas, Linzy & Partners—one of the nation's most highly regarded firms in the field of campaign services and financial resource development. A major force in the industry, the firm has offices in San Francisco, Chicago, Boston,

Sydney, and Melbourne. Since its founding in 1968, the firm has served over 1,400 client institutions.

A frequent speaker on fund raising at conferences, Panas is a regular contributor to professional journals and has made many tapes on financial resource attainment for Teach 'Em, a national distributor of educational and video programs. In the field of philanthropy and trustee governance, he is regarded as an author of particular note: *Managing Schools In Hard Times* Co-Author, 1975; *Mega Gifts*, 1984; *Born To Raise*, 1988; *National Fund Raising Almanac*, 1990; *Boardroom Verities*, 1991; *EXCEL*, 1997; *Finders Keepers*, 1999.

In addition to its national prominence, the firm has also conducted campaigns in France, Greece, Mexico, Australia, and New Zealand.

Panas is founder of Decision Research Institute, one of the nation's largest firms in market research, needs assessment, attitude surveys, and marketing strategy for nonprofit institutions. He is also founder and chairman of the board of the Institute for Charitable Giving, one of the most significant providers of training in philanthropy.

Panas has been professionally involved in fund raising and financial resource development for over 30 years.

Jeannette Regalado



Currently, Jeannette is at Walla Walla General Hospital where she has been the director of development for the past seven years. Jeannette fell into fund raising just after graduation when she was hired as the records coordinator for Union College's advancement office.

This year Jeannette is relying on her 12 years of fund raising experience to help her raise gifts during the hospital's centennial year. She is also showing her creative and artistic side by co-organizing an 1899 Centennial Celebration honoring the hospital's beginnings.

Jeannette is currently on the board of directors for the United Way for Walla Walla County, and is an active member of the Walla Walla Rotary Club.

On a more personal side, Jeannette loves camping, cooking, quilting, and needlework. She has traveled extensively within the western states and for three years she braved the below-zero degrees of Barrow, Alaska.

Jeannette was also a member of this year's conference planning committee.

Brooke Sadler, CFRE



T. Brooke Sadler is president of Rocking Chair Consultants, a fund raising consulting firm for national and international clients. He is also president of Sadler Brothers Development, a land development/construction firm. He owns Nolichuckey Bluffs, which is a cabin rental and bed &

breakfast business.

Brooke retired from Florida Hospital Foundation where he was president for 15 years. During his time there he successfully overshot a \$25 million campaign goal, raising \$33 million to establish the Walt Disney Memorial Cancer Institute at Florida Hospital. He also established an annual special event that netted in excess of \$500,000 annually.

Previous to the foundation Brooke spent 17 years in education, partly as a college president in Sri Lanka and Pakistan and a high school teacher

in Michigan.

His volunteer activities included establishing a board and membership for the Milton Murray Foundation for Philanthropy, the Boggy Creek Gang Camp with Paul Newman and Norman Schwartzkopf as founders and active board members, the Ronald McDonald House of Central Florida, and he is currently a board member for Habitat for Humanity in Greeneville, Tennessee.

Ken Turpen, CFRE



Ken Turpen is the departmental director of Philanthropic Service for Institutions (PSI) at the North American Division of the Adventist church world headquarters in Silver Spring, Maryland. Since receiving a degree in physical education and biology in 1983 from Pan American

University, Ken

worked in Adventist education for 12 years. He spent four years at Valley Grande Academy as the dean of boys and taught physical education. He subsequently taught at Platte Valley Academy in Nebraska where he later became the principal. While in Nebraska, Ken received his master's degree in education administration from the University of Nebraska at Kearney.

Since coming to PSI five years ago, Ken has raised major gifts for five new programs for Adventist education and healthcare and for on-

going PSI programs totaling more than \$4 million. He routinely spends his time with church leaders, hospital administrators, and college presidents developing strategies to further the role of philanthropy in the Adventist church. His loves include his wife, Lisa, and their two children, Kenny and Kara.

Teresa Witt



Teresa A. Witt is the development associate at Shady Grove Adventist Hospital in Maryland. She has worked at the hospital since 1981 and has been with the Foundation since 1989. Over the last ten years, she has served many roles in the foundation. She is currently responsible for the annual giving program, including direct mail, employee giving campaigns, special gifts campaign, and the annual golf and tennis classic.

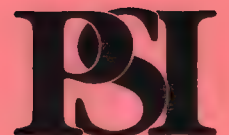
Recent accomplishments include conducting a 1998 employee campaign which raised \$34,000 for the Oncology Unit; organizing the 13th annual golf and tennis classic, which netted \$98,000; and coordinating a two-night phonathon which raised \$13,000 for a breast cancer screening program.

Teresa is the mother of 11-year-old twins Andrew and Angela. She and her husband, Jamie, are very active in their church and the children's school.

The Ministry of Philanthropy

Presented by: Lawrence Jones

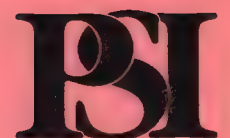
1999 Conference on Philanthropy



The CEO and the Board: Cooperation vs. Competition

Presented by: Bob Andringa

1999 Conference on Philanthropy



Board Development Resources

FOR
Chief Executive Seminar

at conference sponsored by
Philanthropic Service for Institutions

June 27 1999
Colorado Springs, CO

Six of the Keys to CEO Leadership in Board Excellence:

1. Clarify Role of Board and Staff
2. Assist a Board Development Committee
3. Help Select and Retain Good Board Members
4. Clearly Set and Monitor Mission and Major Goals
5. Help Board Govern through a Standing Policies Manual
6. Help Create Great Meetings



By

Robert C. Andringa, Ph.D.
1004 Donal Lane
Vienna, VA 22181

Governance Functions of a Nonprofit Board of Directors

1. **Determine Mission and Basic Values**
(put in writing, review, and hold organization to them)
2. **Approve the Major Goals and Desired Results**
(then let chief executive develop a more complete staff strategic plan)
3. **Maintain Board Standing Policies on All Aspects of Governance**
(ideally compiled in one constantly updated document)
4. **Select a Chief Executive and Hold Accountable to Policies**
(do a professional search; agree up front on expectations; evaluate yearly)
5. **Ensure Financial Solvency and Integrity**
(set wise financial policies; model personal giving; assist as volunteers)
6. **Require Periodic External Audits as Needed**
(finance, program, legal, structure, etc.)
7. **Help Represent the Organization Externally**
(i.e., communicate to key constituents by listening and reporting to them)
8. **Encourage/Nurture Chief Executive and Staff**
(primarily through good policies, fair compensation, show of support)
9. **Serve as "Final Court of Appeals" for Unresolved Internal Disputes**
(*seldom needed*; most are handled by staff; but this could prevent law suits)
10. **Evaluate and Improve Itself as the Governing Board**
(evaluate the board's effectiveness; study and be trained; change as needed)

Q 1: Are there any other functions which should be *added* for your board?

Q 2: Should any of these functions be *deleted* in your job description?

Board vs. Staff Roles in *Major Policy*

POLICY ...	BOARD	STAFF
FORMULATION Identify needs, then form and consider options	YES	YES
DETERMINATION Legal responsibility to decide	YES	NO
IMPLEMENTATION CEO's job. (Directors may be asked to help, as a volunteer)	NO	YES
MONITORING Formal judgement of results (based on reports from staff)	YES	NO

Note: The most neglected of these roles in most organizations is the board's responsibility to monitor results, e.g., determining when they set a major goal what data will be needed by them to determine how well it is being achieved?

Concept from Arthur Swift, 1929, as described by Dr. James M. Hardy in Developing Dynamic Boards, 1990.

The Board Development Committee

Many boards are expanding the role of the traditional nominating committee into a "Board Development Committee" This is one strategy to help the board assume responsibility for its own improvement. Often, this committee is chaired by the vice chairman or the previous chairman of the full board. Individual board members are referred to as trustees or directors. Recommended functions of this committee are:

1. On-going bylaw review
2. Develop, review and monitor the Profile of desired qualifications of new trustees
3. *If applicable:* Notify outside appointing authorities (e.g., national or regional agencies) of talent/experience currently needed on the board
4. Identify, screen, nurture, orient, nominate new trustees
5. On-going board training (often an annual retreat)
6. Evaluate current trustees prior to re-election
7. Annual evaluation of board structure and process
8. Enforce conflict of interest policy as it relates to trustees

Orientation Checklist for New Board Members

4

This is a sample of what your board could develop for your directors (trustees):

- Some things should be understood *before* a person says "yes" to serving.
- Other things should be handled after the election to help a new trustee feel able to participate fully as quickly as possible.

ORIENTATION ITEM		CHECK IF DO PRIOR TO ELECTION	CHECK IF DO SOON AFTER ELECTION	IDENTIFY WHO WILL DO	DATE WHEN DONE
1.	Personal meeting with a board officer				
2.	Personal meeting with chief executive				
3.	Read history, mission, bylaws				
4.	Read biographical info on other trustees				
5.	Read strategic plan, major goals				
6.	Read overview of programs, staff				
7.	Walk-through facilities, meet some staff				
8.	Briefing on programs, current issues				
9.	Briefing on fundraising programs/needs				
10.	Committee assignments/orientation				
11.	Read calendar of meetings, events				
12.	Field visits (if applicable)				
13.	Board Reference Book/Standing Policies				
14.	Review audits, insurance, contracts				
15.	Other:				

Other:

Ideas for your board:

Strategic Planning: A Board and Staff Partnership

Until you can answer the question "why?" the cost (in time, effort, money) is always too high.

1. Two definitions of strategic planning (notice the emphasis on *process*)

- * A process of gaining teamwork for the accomplishment of a complete, documented, but frequently changing organizational action plan.
- * The process by which the guiding members of an organization envision its future and develop the necessary procedures and operations to achieve that future.

2. Benefits of good strategic planning (by board in general; then by staff in specifics)

- * Ability to recruit appropriate board members and focus their efforts
- * CEO focus and application of personal strengths
- * Donor confidence in the future of the organization
- * Staff teamwork and higher morale through an open process
- * Reduced crisis management because all know the key directions
- * Improved effectiveness (doing right things) and efficiency (doing things right)
- * Saved time, money and materials at all levels
- * Increased satisfaction and loyalty among stakeholder groups
- * Better recruitment of key employees to accomplish agreed upon "ends"
- * Focused board and staff meetings
- * Better results from marketing/advertising
- * Basis for organization and employee evaluations

3. A normal process and key players in strategic planning:

Initiate process.....	Either the board or the CEO
Basis for plan.....	Board-approved mission, key goals, values, parameters on means
Write plan	Mix of motivated and talented people, led by CEO; linked to board goals
Approve plan.....	Often the board, but not necessary if board's policies are clear on goals
Implement plan.....	CEO (and other staff, who may develop their own department plans)
Monitor plan.....	Staff; and board through its requested reports on its own ends/goals
Modify plan.....	CEO, based on monitoring and new board policies

Board Standing Policies Manual: An Overview

Note: The Policy Governance Model was developed in 1990 by Dr. John Carver. I am among many who now promote various versions of this highly developed model. Among the resources for more detail are Dr. Carver's two main books: *Boards That Make a Difference* (Second edition, 1997 by Jossey-Bass) and *Reinventing Your Board: A Step by Step Guide to Implementing Policy Governance* (also 1997 by Jossey-Bass).

Good board policies should be...

- | | | |
|----|---------------------|--|
| 1. | Explicit | always in written form |
| 2. | Centrally available | kept in one document (not in years of minutes) |
| 3. | Current | changed at each board meeting to reflect new data and wisdom |
| 4. | Literal | mean what they say; not full of legal jargon |
| 5. | Brief | total may never exceed 15 pages |
| 6. | Consistent | with law, Articles of Incorporation, Bylaws |
| 7. | Comprehensive | encompass the entirety of that which is governed |
| 8. | Limited | leave details to management policies written later by CEO |

They come in "sizes"--

1. "Inasmuch as there are fewer policies than decisions based on those policies, the board's task is already easier than if it had tried to address all the single decisions."
2. The board develops policies "from the outside in," meaning the most general are written first. Then, like nesting bowls, smaller ones are developed sequentially until the board is willing to accept any reasonable interpretation of the policy language by the CEO. primarily)

There are four categories of policies in a Policy Manual:

1. *Ends Policies* answer: Which results, products, outcomes should be achieved...for which defined groups of people...at what priority level or cost? Follow which values?
2. *Governance Process* policies answer: What structure and process does the board want for itself?
3. *Board-CEO/Staff Linkage* policies answer: How does the board want to relate to its one agent, the chief executive officer, and staff in terms of roles, CEO evaluation, monitoring of results, other reports, etc.?
4. *Executive Limitations/Parameters* policies answer: what does the board not want (or explicitly does want) the CEO/staff to do in pursuing the ends policies? Often grouped into chapters that mirror board committees, e.g., chapter on finances, development, programs, etc.

What a Board Meeting Does for Me as the CEO

Bob Andringa, President, CCCU

- A. Requires me and management team to revisit the mission, the vision, the major goals.
- B. Forces clarity and closure on many pending matters by preparing materials and recommendations
- C. Helps me understand how our leaders are thinking; what concerns them
- D. Gives an opportunity for senior staff to understand how our official representatives of our members/moral owners think and decide
- E. Provides--only two or three times a year--fairly clear answers to the six questions all employees have, including the CEO --
 - 1. What am I expected to do?
 - 2. Why is that important?
 - 3. Do I have authority to do it?
 - 4. When I need help, where can I go?
 - 5. Are my ideas taken seriously?
 - 6. How am I doing so far?
- F. Helps me clarify once again my own purpose and mission in life
- G. Leaves me with a good sense of the adjustments I/we need to make
- H. Reminds me of God's grace when I see how much is accomplished by board members from various backgrounds and perspectives
- I. When I report on progress, it reminds me of how little I actually can do compared with helping our staff and volunteers achieve common goals


What does a board meeting do for you???

Good Nonprofit Board Reports

1. Board should define WHAT reports it wants to monitor achievement of its major goals...with help from staff.
2. Board should decide WHEN it wants specific reports...monthly, quarterly, whenever X happens, etc.
3. Reports should measure the “ends/results” or goals, not just activities or means.
4. Financial reports used by staff are usually too detailed for board use and do not identify where the “red flags” are in the report.
5. Put reports in a historical context...data today, 1 year ago, 5 years ago.
6. Put reports in context of comparisons to similar organizations.
7. Use graphics whenever possible.
8. Check reports in-house for accuracy before sending to board.
9. Leverage work of preparing reports for other purposes, e.g., newsletter, donor reports, annual report.
10. Ask for help of outside experts to design board-friendly reports.
11. Ask board annually to evaluate reports and redefine their reporting needs.
12. Keep an archives of reports for future reference.
13. Put some reports on your web page for the general public.
14. Use reports to inform and train staff.
15. Ask board development committee to do an annual report on the “state of the board” to encourage quality and accountability of the board itself.

Sources & Types of Donations for Nonprofit Organizations

1. Write in each cell the approximate income from that source over last two years.
2. Then draw a circle around those items (letters) you think you might be able to use.
3. Ask each board member to identify two or three of the marked cells in which she or he feels most interested and able to help as a volunteer in the fundraising effort.
4. Then train and coach board members for results.

SOURCE 	INDIVIDUALS	BUSINESS & CORPS	FOUNDATIONS	GOV'T OFFICES	NON-PROFITS
TYPE :	Gen'l, Major Donor, Deferred	Marketing Expense, Contribution	General, Family, Operating	Federal, State, Local, Schools	Churches, Associations, etc.
Annual Giving (Unrestricted gifts)	A	B			C
Mass Mailings (Unrestricted gifts)	D				
Project/Program Grants (Restricted use)	E	F	G	H	I
Events (General or Restricted)	J	K			
Capital Gifts (Bldgs, endowment)	L	M	N		
Income from Planned Giving	O				
In-Kind Gifts (goods/services)	P	Q	R	S	T
Approx. total dollars in last two years??	\$	\$	\$	\$	\$

Potential Sources of Income for Nonprofit Organizations

10

Which numbered options are possible sources of funds for your organization?

What board policies should guide each one? Who should take the lead in pursuing the sources selected?

Revenues and Reimbursements	
CATEGORIES	
Memberships	1
Tuition/Registrations	2
Contracts	3
Sales	4
Subscriptions	5
Insurance/other Reimbursement	6
Other?	7

Contributions and Grants						
CATEGORIES	ANNUAL GIVING	MASS APPEAL	PROGRAM GRANTS	EVENTS	CAPITAL FUNDS	IN-KIND
Individuals: A - Current Giving B - Deferred Giving	8	9	10	11	12	13
Government			14			
Business	15		16	17	18	19
Foundations			20		21	
Nonprofit Organ.	22		23		24	25

Investment Income		
CATEGORIES	ORGANIZATION FUNDS	PROFIT-SEEKING SUBS.
Cash accounts	26	
Securities	27	
Real estate (rent)	28	
Real Estate (dev/sales)	29	
Div. From subsidiaries		30
Sale of subsidiary	31	32
Other	33	

Idea for categories stimulated by The Board Member's Guide to Fund Raising by Fisher Howe, The National Center for Nonprofit Boards, Washington, DC.

Nonprofit Boards: 12 Attributes of Excellence

1. Role of board is clear and distinct (non-competitive) from role of staff.
2. Governance is the board's focus, not management.
3. Board members understand their "3 hats" -- governance hat, volunteer hat, policy implementer hat (this last is seldom used when there are staff).
4. Board is clear about and "links with" its "*moral owners*" (those to whom it feels accountable) and is clear about the organization's "*primary beneficiaries*."
5. Board adopts clear "Ends" policies, i.e., "which benefits?...for whom?...at what cost/priority?" (Then requires CEO to form a strategic plan linked to them.)
6. The CEO is the one agent of the board; responsible for achieving the "ends" policies within clear board parameters (other policies) on the "means."
7. All board "standing policies" are organized in one document, encompassing all board functions, and reviewed/improved at every meeting.
8. The board chairman "manages" the board, with support from the CEO.
9. Committees are formed to efficiently serve the board's needs, not staff needs, i.e., committees speak *to* the board, not *for* the board. And staff help committees fulfill that role.
10. Board meetings are well-planned with "board-friendly" advance materials, good agendas, clear results, time for board fellowship.
11. New board members are selected based on known criteria for the right "mix" of board members and are well oriented (both before and right after election).
12. The board accepts responsibility for improving itself.

by Dr. Bob Andringa, author of *Nonprofit Board Answer Book: Practical Guidelines for Board Members and Chief Executives*, National Center for Nonprofit Boards, Washington, DC. 1997.

The Nuts & Bolts of Annual Giving

Presented by: Ed Ammon, CFRE

1999 Conference on Philanthropy



Building Effective Relationships with Volunteers and Donors

Presented by: Brooke Sadler, CFRE

1999 Conference on Philanthropy



Board Excellence: Can an Organization Be Better Than Its Own Board?

Presented by: Bob Andringa

1999 Conference on Philanthropy



26 Ways to Improve Your Nonprofit Governing Board

Robert C. Andringa, Ph.D.
10004 Donal Lane
Vienna, VA 22181

I am a collector of what works. Perhaps like you, I glean the best of the best and try to save it for future use. In the case of nonprofit boardsmanship, I have been consulting with dozens and dozens of boards for over fourteen years. Guess what? There is not one perfect board!

If you are a CEO, there is no greater legacy of your leadership than an effective board of directors. Research shows it is difficult to have a strong board without the active commitment of the CEO to help make it strong. If you are a director, be bold in challenging your colleagues to identify the areas of dysfunction almost every board endures. Then move to address the board- governing process so that your board reflects excellence.

Although there are many good books now available on the subject of boardsmanship, one thing I've learned from board members is that few of them want to spend the time to read books. Consequently, I have developed an evolving list of the key characteristics of the most successful boards I have seen. The list follows.

As you read, look for those principles which will address your board's current felt needs. Select only a few to introduce to the board at first. Although it is wise to implement some before others, most of them could be adopted in any order. Each item could consume an hour or more of dialogue at a board meeting. I hope having them all in brief form will help you identify those areas where you can concentrate your attention. Incidentally, the words director, board member and trustee are used interchangeably in the nonprofit world.

Of all the books and manuals I have read, I have found that the most exciting paradigm for boards today is the "policy governance model" developed by Dr. John Carver. John's books *Boards That Make a Difference* (Jossey Bass, 1990) and *Reinventing Your Board: A Step-by-Step Guide to Implementing Policy Governance* (Jossey Bass, 1997) have made this a very popular model. Several of the 26 ways to improve your board outlined in this paper either reflect or complement this model.

The best source of training materials, generally, is the National Center for Nonprofit Boards, Washington, DC. Call for their resource catalog. (800/883-6262) The National Center is the publisher of my book, *Nonprofit Board Answer Book: Practical Guidelines for Board Members and Chief Executives* (1997). Colleges and universities have good materials available through the Association of Governing Boards (800/356-6317).

Clarify Mission, Ends vs. Means, and Roles for Board and CEO

1. Get board agreement on written descriptions of (a) the "moral owners" of the organization --those who feel invested in the organization and to whom the board feels accountable for its trusteeship; and (b) the "primary beneficiaries" of the organization--those whom the organization's efforts are designed to benefit most. Many directors/trustees confuse the two. Sometimes, they are the same group.
2. Have written "ENDS" policies, including a mission statement, which answer clearly: which benefits? ... for whom? ... at what cost (priorities)?
3. Have written policies which provide clear parameters (or limitations) on the MEANS the CEO and staff may use to achieve the board's ENDS policies. Then say to the CEO, "Go ... Use your creativity and professional skills to achieve our ENDS ... Just don't go beyond the policy boundaries (parameters) we have placed around what you can do."
4. Teach the "three hats" trustees wear: (a) *Governance* hat: worn only when officially convened for business meetings; (b) *Implementor* hat: worn only when implementing an assignment given formally by the board; and (c) *Volunteer* hat: worn at all other times, including when advising staff or helping them accomplish the work of the organization.
5. Write job descriptions for chair, board members, committees. Negotiate with the CEO specific performance objectives for the year ahead. Miscommunication in board work is often the result of differing assumptions about who was to do what!
6. Create a Standing Policies Manual so all on-going policies are in one place. Review old minutes to see what policies legally are still on the books but forgotten. ALL standing policies, together, should never take more than a dozen or so pages. Once first written, most meetings consist of a review and refinement of this document. Note: Policies should be written from the "outside in," i.e., broadest policies before the next most specific, etc.

Recruit Quality Board Members to Meet Specific Needs

7. Develop a "board profile" of characteristics, experiences, skills, etc. needed on the board; evaluate which ones are filled by current members; identify major gaps in knowledge and experience which should be filled when recruiting future trustees. You are building a professional team which needs varied talents and experiences. If all trustees have the same background and perspective, your board will be less than it can be.
8. Have a plan for identifying potential trustees (directors) and engage them as volunteers long before election to the board. For example, appoint good prospects to an advisory council, task force, or board committee (if your bylaws allow, which they should).
9. Develop and implement an effective process for orientation of individual prospects *prior* to formal nomination and election. A knowledgeable and sincere "no" from those invited to be a nominee is better in the long run than an uninformed, half-hearted "yes." Take

enough time to ensure that both parties--the board and the candidate--see the benefits of service before the election. As a wise man once said, the easiest time to fire a person is before retaining him.

Structure Board, Committees and Advisory Groups to Be Effective

10. Just like the policies required in items 2 and 3 above, develop a discrete "chapter" in the full set of board policies to guide the board's own operations. Address the key questions: Size, terms, etc.? Format, frequency of meetings? What monitoring data do we need? Some policies related to how the board actually works are reflected in bylaws, but many will need to be documented in the Standing Board Policies and changed frequently.
11. Use committees to help the board do its work, not just oversee staff work. If you have an Executive Committee, limit its authority to only those things the board cannot be convened to do in a timely fashion. Have a standing Committee on Board Development to do: board and officer nominations, board member orientation, bylaw review, board evaluation, and board training. Remember, committees ordinarily speak *to* the board, not *for* the board.
12. Maximize volunteer involvement through the use of advisory groups, ad hoc task forces, and non-trustee membership on some board committees. No board has all the expertise the organization needs! Remember that all volunteers (including trustees when wearing their volunteer hats) need clear role definitions and clear assignments under the authority of the CEO or another designated staff member or volunteer.
13. Define the chairman's role and encourage him or her to be a strong leader. The chairman should supplement and complement the CEO in building a strong board. Make sure the two leaders know and appreciate each other's personality, style, motivations, values, and expectations. The chairman manages the board. The chairman, although not allowed to "set policy," is the best one to interpret board policy to staff and maintain good board-CEO communications.

Make Board Meetings Meaningful

14. Meet at least three times a year, with meetings scheduled far in advance, for specific purposes, with advance agendas. Be results oriented. Focus on reviewing and clarifying the ENDS policies; that is, do not just evaluate MEANS (any activity is a MEANS), but whether lives are being changed through those MEANS. Ask that most staff reports be mailed in advance to reduce staff talk at the meeting.
15. Plan for the best physical setting, create special informative displays, organize a meaningful event, serve good food. Meetings are where most trustees either develop loyalty and commitment or experience frustration and disenchantment. Try to meet over a weekend in a retreat setting for an annual review and planning. Offer to reimburse trustees' expenses. Have good meetings and then don't tolerate continuous absences!

16. Consider a wise "mentor" (probably not a board member) to observe meetings. A "mentor" can remind the board when it is getting into the work of administration and coach it toward board excellence. Board members themselves are too often reluctant to call attention to bad boardsmanship. That risks relationships. Still, the board must continue to develop its own competencies and a mentor can help.

Sharpen Board Communications

17. Agree that board members need three distinct types of information: (a) Decision information to help set policy; (b) Monitoring information to evaluate how well board policies are being implemented; and (c) Incidental information for the general education of board members. The CEO is responsible for managing most of the information flow.
18. Design reports that are tailor made for busy board members, i.e., put information in context, use graphics, show comparisons with the past, identify options with pros and cons. Usually, reports written for staff are not the best to give to the board.
19. Produce a Board Reference Book with tabs for 20 or so items that can be reviewed quickly during meetings, e.g., bylaws, "standing policies," the latest financial report, a list of board and staff, a summary of insurance policies, copies of the minutes for the last three meetings, committee assignments, etc.
20. Insist on timely minutes that are clear and well organized. They should reference by number all the Standing Policy statements which were amended. (A revision of the Standing Policies themselves contains the content.) Mail minutes and the updated Standing Policies within two weeks of a meeting.
21. Encourage at least annual, private meetings between the CEO and each trustee. Board members serve for different reasons and they hope their special needs will be met. The chairman and CEO should plan how to meet those individual expectations. Good CEOs go far beyond this with anniversary and birthday cards, occasional phone calls, and special trustee newsletters.

Commit to CEO and Board Performance Evaluations

22. Make sure the board arranges for an annual performance evaluation of the CEO based on the performance objectives negotiated a year earlier. (Trustees should not interfere in other staff evaluations, but hold the CEO accountable for doing those, including an assessment of how key staff respond to board-related assignments.) Ask the CEO for a

written self-evaluation as part of the review. Give that to all directors and ask them to give input to the small review group (often the Executive Committee).

23. Evaluate the board's performance annually. This can be done by a Board Development Committee, an ad hoc task force, an outside evaluator, a survey, etc. Let trustees give candid feedback, maintaining confidentiality to get honest views, and then review the results in a setting where changes can be discussed. The nomination process should also allow for evaluating individual trustees against predetermined criteria and roles.

And Consider These Additional Dimensions of Board Excellence

24. Write out your "corporate values" and develop a code of ethics to guide the organization in such things as fund raising, hiring and firing staff, honesty in marketing, payment of bills on time, etc. Have a written conflict of interest statement that applies to trustees.
25. Develop an Annual Affirmation Statement for each trustee to sign prior to the nominating cycle, even for those in the middle of their terms. Ask for recommitment to the mission, to the time required, to any statement of faith or creed, to your conflict of interest policy, to an expectation that each trustee become an annual donor of record, and to anything else the board believes is important for it to become a more excellent board.
26. Schedule periodic external "audits"--financial ("review" rather than audit could work for small organizations), legal and insurance, program, management, board performance--facilitated by objective outside experts.

Be the best you can be!

The Role of Leadership in Philanthropy

Presented by: Jerry Panas

1999 Conference on Philanthropy





TRUSTEE ASSESSMENT OF THE BOARD[®]

CRITERIA AND CHARACTERISTICS	Score	5	3	2	-1	-2	0	0
	Rating	Very Good	Good	Fair	Poor	Do Not Have	Not Applicable	Not Certain
COMMITMENT TO THE ORGANIZATION'S MISSION, PURPOSE, GOALS								
1. The board's process for regularly reviewing, reaffirming, and revising the Mission Statement of the institution.								
2. The trustees' understanding of the institution's purposes and objectives.								
3. Trustees of this board consider this affiliation their primary board relationship and volunteer involvement.								
4. My personal commitment to the organization's mission, purpose, and goals.								
UNDERSTANDING OF THE ROLES AND RESPONSIBILITIES OF THE BOARD								
5. The regularity of meetings of the board's standing committee on trusteeship.								
6. The process, concern, and study which is given to selecting new trustees.								
7. The mix of the board (age, interest, business affiliation, past experience, financial resources, skills, etc.)								
8. The size of the board in relation to the needs and operation of the institution.								
9. The practice and procedure of indoctrinating and orienting new board members.								



©

TRUSTEE ASSESSMENT OF THE BOARD

CRITERIA AND CHARACTERISTICS	Score	5	3	2	-1	-2	0	0
	Rating	Very Good	Good	Fair	Poor	Do Not Have	Not Applicable	Not Certain
10. The process and concern with which board officers are elected.								
11. The regularity with which the board conducts a self-evaluation of its activity, work, and production.								
12. The understanding and dedication to trustees of their proper role and responsibility.								
13. The level at which trustees take the commitment and responsibility of board membership.								
14. My personal understanding of roles and responsibilities of the board.								
ATTENDANCE AND INVOLVEMENT IN BOARD AND COMMITTEE MEETINGS								
15. The manner in which the agenda is planned in advance to assure interest and participation.								
16. The material and information that is sent in advance of the board meeting to prepare trustees.								
17. The extent to which trustees do their pre-board meeting reading and homework.								
18. The number of times the board meets in terms of the institution's needs.								
19. The attendance at board meetings.								
20. The quality of participation and discussion at board meetings.								



TRUSTEE ASSESSMENT OF THE BOARD®

CRITERIA AND CHARACTERISTICS	Score	5	3	2	-1	-2	0	0
	Rating	Very Good	Good	Fair	Poor	Do Not Have	Not Applicable	Not Certain
21. The chair's ability and concern about encouraging the full participation of each trustee.								
22. The participation at board meetings is open, candid, and reflects all possible opinions.								
23. The camaraderie and esprit of the board.								
24. The practice of trustees to act as a team.								
25. The board's knowledge and understanding of the activity of major committees.								
26. The appropriateness and effectiveness of standing committees that meet and report on a regular basis.								
27. The understanding of trustees of their requirement for involvement and work as a trustee.								
28. My personal attendance and involvement in board and committee meetings.								
MANAGEMENT OF FINANCIAL RESOURCES								
29. Financial records of the institution are audited annually and a certified report is presented to the board in a timely fashion following the close of the fiscal year.								
30. Financial reports are presented and discussed at each board meeting, and are understood.								



©

TRUSTEE ASSESSMENT OF THE BOARD

CRITERIA AND CHARACTERISTICS	Score	5	3	2	-1	-2	0	0
	Rating	Very Good	Good	Fair	Poor	Do Not Have	Not Applicable	Not Certain
31. The degree of attention and concern given to the proper investment of reserves and endowment funds.								
32. The regularity in which governing policies, bylaws, etc. are reviewed for appropriateness and relevancy.								
33. The board's written policy and enforcement of possible conflict of interest with trustees and their business relationships.								
34. The board's concern about the allocation of funds to ensure the optimum operation of the institution.								
35. My personal concern for the organization's financial resources.								
SUPPORT OF CHIEF EXECUTIVE OFFICER AND STAFF								
36. The amount of time provided to the chief executive officer to give an unhurried status report.								
37. The depth and pertinence of data and information provided trustees to properly understand and interpret the work of the institution.								
38. The board's working relationship with the executive officer.								
39. The board's working relationship with the administrative staff.								
40. The use of staff people to make reports and presentations at meetings.								
41. The use of institutional participants and users in making presentations and reports at meetings.								



TRUSTEE ASSESSMENT OF THE BOARD®

CRITERIA AND CHARACTERISTICS	Score	5	3	2	-1	-2	0	0
	Rating	Very Good	Good	Fair	Poor	Do Not Have	Not Applicable	Not Certain
42. The trustees' understanding and practice of separating administrative functions from trustee matters and not interfering in areas reserved for the administration.								
43. The board's determination to maintain a salary structure for its chief officer and staff which is at a high level and appropriate for the field.								
44. The board's provision and practice for a careful and objective evaluation of the chief executive's work based on predetermined and accepted objectives.								
45. My working relationship with administrative staff members.								
PARTICIPATION IN STRATEGIC PLANNING								
46. The degree to which the institution's short-term objectives and long-range goals are in place and understood by trustees.								
47. The priority that is given to major, consequential, and long-range issues versus day-to-day matters.								
48. The quality and level of planning of the board's annual retreat.								
49. Attendance of trustees at the board's annual retreat.								
50. The understanding of the needs and interests of the institution's constituencies.								
51. Before making decisions regarding policy and other important matters, the degree of opportunity the board has to review and discuss all appropriate data and information—whether positive or negative.								



TRUSTEE ASSESSMENT OF THE BOARD

Score	5	3	2	-1	-2	0	0
Rating	Very Good	Good	Fair	Poor	Do Not Have	Not Applicable	Not Certain
CRITERIA AND CHARACTERISTICS							
52. My personal participation in strategic planning.							
MONITORING AND EVALUATION OF ACTION PLANS							
53. The promptness with which board minutes are mailed following a meeting.							
54. Reports of major committees are presented in writing, and there is ample opportunity for understanding and discussion.							
55. The board's practice of monitoring and evaluating its success in achieving objectives and goals.							
56. The board's understanding, concern, and assessment of the institution's success in its service area.							
57. The board's understanding, concern, and assessment of the institution's success against its competition.							
58. The board's attentiveness to and evaluation of the public relations of the institution.							
59. The regularity of trustees visiting and inspecting the institution's facility and departments.							
60. My personal involvement in monitoring and evaluating action plans and objectives.							
GIVING AND ASKING OTHERS TO GIVE							
61. The level of understanding and commitment of trustees of their responsibility to ensure an adequately funded institution to meet its mission and objectives.							

TRUSTEE ASSESSMENT OF THE BOARD®

CRITERIA AND CHARACTERISTICS	Score	5	3	2	-1	-2	0	0
	Rating	Very Good	Good	Fair	Poor	Do Not Have	Not Applicable	Not Certain
62. The trustees' willingness to identify and provide information concerning potential donors.								
63. The level of understanding and commitment of trustees of their responsibility to make gifts (annual, capital campaign, and/or deferred) to the institution.								
64. The level of understanding and commitment of trustees to their responsibility to solicit gifts (annual, capital campaign, and/or deferred) to the institution.								
65. The trustees' willingness to accept responsibility for regular cultivation of prospects and donors.								
66. The trustees' participation in plans for recognition of prospects, donors, and retiring trustees.								
67. My personal level of giving.								
68. My personal involvement in asking others to give to the institution.								



TAB® Scoring

1 Number rated *Very Good*

_____ Times 5 Equals _____

2 Number rated *Good*

_____ Times 3 Equals _____

3 Number rated *Fair*

_____ Times 2 Equals _____

4

#1, Plus #2, Plus #3

Gross Positive Total

5 Number rated *Poor*

_____ Times 1 Equals _____

6 Number rated *Do Not Have*

_____ Times 2 Equals _____

7

#5 plus #6

Gross Negative Total

Subtract line #7 from line #4

8

Line #4 = _____

9

Minus line #7 = _____

10

Total Net Score

11 There are 68 Criteria and Characteristics in the Grid:

68

12 Indicate the number of items you marked Not Applicable or Not Certain

13 Subtract line #12 from line #11

Total Items You Used In Scoring

Now, determine the average by dividing line #10 by line #13

14 Your Total Net Score (line #10)

15 Divided by the Total Items Used in Scoring (line #13)

16

Your Tab Score Is

TAB® Ranking

4 and above

A superb board. Your institution is assured of growth, development, and success. You are headed for greatness.

3.2 to 3.9

An outstanding board. But take care of those few areas where you are deficient.

2.3 to 3.1

A good board. Review carefully those areas that need correcting. With proper attention, you could be outstanding.

1.4 to 2.2

You are not functioning as well as you should. Appoint a Special Task Force to evaluate your practices and implement necessary changes.

1.3 and lower

You have problems that should be corrected. Chances are almost certain that your poor showing also reflects the performance of the institution. Improve your effectiveness and the institution is assured of improvement.

What Can You Get for 33 Cents?

Presented by: Carolyn Hamilton

1999 Conference on Philanthropy



What can you Get for 33 Cents?

*A seminar on Direct Mail
Instructor: Carolyn Hamilton
8th Triennial Conference on Philanthropy
June 27, 1999*

Plenty, if you remember two points!

1. Segment, Segment and Segment some more
(and then evaluate, evaluate)
2. Tell a Story

"The business of direct mail fundraising is changing in genuinely fundamental ways under the onslaught of new technologies--internetworking, multimedia, wireless communications, etc. Our appeals need to be individualized, multisensory, information rich, immediate, interactive and communal."

Mal Warwick, Technology and the Future of Fundraising

Direct Mail is not Fundraising--it is just a tool

Don't Get it Backwards

Your goal is not to produce direct mail pieces. Your letter and package are not your objective. Know your:

DESIRED RESPONSE FOR DIRECT MAIL PIECE

Title of DM Package:

Goal (desired response)

Key Motivation:

Audience: Primary

Secondary

Package Pieces:

Drop Date: _____

Analysis

Measure of Desired Response:

Percentage of Return:

Average Gift:

Analysis of Goal:

Future Action:

American Generations in the 20th Century

Generation	Lifestyle	Values	Major Experiences	Giving Style	Fulfillment
Today's Elderly 75+ (Before 1925)	Save, Save	Civic "We fought for it"	Depression Era	Asset Rich Concerns about outliving \$\$ Like direct mail	Time to read Deferred givers
WWII Generation 55-75 (1925-1945)	Save, then spend	We've earned it Want security Believe in sacrifice and hard work	WWII Adaptive	Loyal Face-to-Face Like direct mail	Checks Give one-time gift of assets perhaps through planned giving Renew/upgrade
Baby Boomer 35-55 (1946-1964)	Greedy Spend, then save	Idealistic "We deserve it"	Prosperity, large size, responsive marketplace	Face-to-Face Not loyal Telephone Video Must feel special	Pledges credit cards major gifts by bequest recognition
Baby Buster-GenX 20-34 (1965-1978)	Don't expect what parents had. Cautious. Spend on entertainment	pessimistic fearful/frustrated concerned over quality of life environment, self-issues	High tech/high touch See a troubled word-- want to fix it.	Computers Radio speed High disposable income Want to know where it's going	Electronic fund Transfer, or bank draft Use of debit cards not major givers
Baby Boomlets Under 20	Instant Gratification	Civic minded Spiritual-new age More interested in involvement. peers/friends	Latch-key kids High tech Value truth	Uncertain	High tech

BEGINNING THE DIRECT MAIL PIECE

1. Start with What you Want the Reader to Do
Segment, so you know who you are writing to
Consistent Donors
Lapsed donors
Never-givers
Upgraded donors
What is the desired response? Example: To get
never givers to give first gift of \$10
2. Always Write the Letter First
You may want to write the first paragraph last
3. No "ASIAN" lead paragraphs
Capture interest immediately, or it may be too late
Avoid "warming them up."
4. Tell a Story, and let the story tie your letter together
5. DON'T RUN IT BY A COMMITTEE!
6. Write to ONE person (no "all of you"s)

7. Let the letter help the reader FEEL something
 - Feel a Connection/Relationship
 - Feel a partnership
 - Feel that the gift counts/matters
8. Tell the reader what she is giving for
 - Be honest.
9. Tell the reader how much to give
 - Renew
 - Upgrade
 - SPECIFIC RANGE OR AMOUNTS
10. Not "we" centered, but "you" centered
11. Keep the sentences short, paragraphs short.
 - Don't be afraid of one sentence paragraphs.
12. Keep it moving with one continuous message
13. Don't apologize, don't beat around the bush

14. Tell the reader what benefit he receives by giving
Membership
Association with President/Principal
A sense of mission
15. Put in a date, deadline if applicable--urgency
16. Don't talk about your fund raising program--don't give
many statistics, if any

THE PACKAGE

1. What do you need in a mail package?
 - Dynamic Letter
 - Return Envelope
 - Reply Device -- restate the letter/positive action
 - Reply card should stand on its own
 - Label
2. Outer envelope: Consider:
 - Teaser -- be sure its sincere!
 - Color
 - Hand-addressing
 - Commemorative Stamp
 - Odd Size
 - Vary the look
3. Additions to package
 - Brochure -- if it's not on track it may LOWER your response.
 - Photo?
 - News clipping?
 - Short personal note?
4. Capture me quick or I'm gone!

POINTS TO PONDER

How long should a letter be?

Jerry Huntsinger writes, "People who don't read long letters don't give."

Do we pay return postage?

Many do not, and it hasn't hurt results. TEST

How often should we mail?

Often--but not always a direct appeal

How do I get ideas?

Get on mailing lists

Go to your parents mail box

Try some of these books:

Growing from Good to Great by Judith Nichols

Teach Yourself to Write Irresistible Fund-Raising

Letters by Conrad Squires

How to Write Successful Fund Raising Letters by

Mal Warwick

Any titles by Jerry Huntsinger

How do I evaluate/test my results?

Code mail packages

Color return envelopes

Who should sign the letter?

Not a committee

Volunteer Vs. President/Principal

How specific should you be about the project?

Restricted vs. Unrestricted

Try a shopping list

Should I use the computer to personalize?

Ask: Can we do it well?

Does it sound sincere?

Don't do it, just because you can

What about a P.S.? It is often the first thing your reader reads.

Restate the actions requested

Restate immediacy

Show how important their gift is--how you are
counting on him/her

Clans, Cocoons & Conservatives

Presented by: LuAnn Davis, CFRE & Becky May

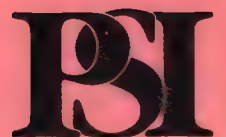
1999 Conference on Philanthropy



Advanced Planned Giving: Converting Challenges to Opportunities

Presented by: Cyril Chern, CFRE, A.I.A., Esq.

1999 Conference on Philanthropy



Planned Giving Basics: 10 Easy Answers to 10 Hard Questions

Presented by: Cyril Chern, CFRE, A.I.A., Esq.

1999 Conference on Philanthropy



Radical Recognition

Presented by: Kellie Lind, Jackie Bragaw, Teresa Witt

1999 Conference on Philanthropy



Numbers! Help! I Need an Interpreter

Presented by: David Morgan

1999 Conference on Philanthropy



Listening: A Gift from the Heart

Presented by: Mary Jane Mapes

1999 Conference on Philanthropy



Notes:

Mad, sad, glad, scared

Sharpening Your Arrows: Campaign Readiness

Presented by: Jerry Linzy

1999 Conference on Philanthropy



PREPARING FOR A CAPITAL CAMPAIGN

**Jerry A. Linzy
Jerold Panas, Linzy & Partners**

**Philanthropic Services for Institutions
8th Triennial Conference on Philanthropy**

**Monday
June 28, 1999
1:30 pm - 2:45 pm**



ASSESSMENT OF CAMPAIGN TIMING

The **ASSESSMENT OF CAMPAIGN TIMING** is an instrument which measures twenty-one independent criteria of campaign readiness. Separately, each is of consequence. But together, at the right levels and in the proper combination, they assure the success of a capital program.

ACT is most effective when completed individually by board members and then discussed in a group session. It is the candid and thorough examination of each item publicly that helps strengthen complete understanding and initiates appropriate action.

The first column of **ACT** calls for your subjective rating. **10** is the highest possible score, **1** the lowest.

Where you feel your organization deserves a top rating, give the item a **10**. Where you feel there is room for improvement, make an assessment of how serious the deficiency is and determine the rating.

10	Best possible rating
9	At an excellent level, but not perfect
8	Very good—but requires some attention
7	Good—but needs improvement
6	Satisfactory—needs serious work
4 and below	Unacceptable—immediate correction is called for

Each item in **ACT** is given a weight—the higher the weight, the greater the consequence of the criterion for the success of the campaign. Each has been measured carefully for its significance.

Multiply your rating in the first column times the weight in the second column—and indicate the total in the third column.

When you are finished, total the third column on each page, and add together. Your total score is: _____

925 - 1000	You're ready. What are you waiting for!
840 - 924	You will almost certainly have a successful campaign. Take time to correct the few deficiencies you have.
715 - 839	You're close. You still have some work to do before you can be assured of success. Begin now to make the necessary changes.
714 and under	You're not ready, not nearly. You need to spend time improving the critical areas which will determine your ability to reach the goal.

ASSESSMENT OF CAMPAIGN TIMING

ACT FACTOR	YOUR RATING	ACT WEIGHT	TOTAL
1. EXECUTIVE DIRECTOR HAS BEEN ON THE STAFF FOR A MINIMUM OF 24 MONTHS <i>Grade this a '10' if the Executive has been with you for at least 24 months. Deduct a point for every three months less than 24 months.</i>		1	
2. YOUR BOARD IS UP TO THE FULL COMPLEMENT OF MEMBERSHIP WHICH IS ALLOWABLE IN YOUR BYLAWS <i>Grade this a '10' if you have no vacancies. For each vacancy, give yourself '1' less in rating—for instance, if you have 2 vacancies, give yourself an '8'.</i>		1	
3. BOARD ATTENDANCE DURING THE PAST 18 MONTHS HAS AVERAGED 80% OR MORE <i>Total all of the board meetings you have had during the past 18 months and compute your attendance. If it is 80% or more, give yourself a '10'. For every 5% less than 80% deduct '1' point in rating. For instance, if you had an average of 63% attendance, you should receive a '6'. If, by the way, your attendance averages less than 50% for regularly scheduled meetings—you are in serious trouble as far as the vitality and commitment of the board is concerned. You should probably not even be thinking about a campaign.</i>		3	
4. THERE IS WHOLE-HEARTED AGREEMENT BETWEEN THE STAFF AND BOARD REGARDING THE WORTHWHILENESS OF THE PROJECT, AND THEY ARE WILLING TO WORK TOGETHER TO BRING THE PROJECT TO FRUITION <i>It is not uncommon for staff to initiate ideas and often to be the inspiration behind a campaign project. You hope to have a staff that provides leadership and motivation. It is unacceptable, however, to have a capital program that is entirely staff-driven. There must be a sharing of vision and dreams. The board must accept the project as their own. They must have a sense of excitement and high expectations. If this doesn't exist, or if some of the board members are not enthusiastic advocates of the project, give yourself less than a '10'. The situation needs to be either corrected or the apathetic (or negative) directors need to determine whether they can continue to stay on the board and remain effective.</i>		8	
5. THE PROJECT MEETS A VALID NEED <i>The completed project fills a justifiable and urgent valid need, and has been tested in such a way that there is some substantiation. Further, the project helps fulfill your mission and is in keeping with your philosophy of operation. Give yourself a full '10' if it meets all of these criteria.</i>		8	



ASSESSMENT OF CAMPAIGN TIMING

ACT FACTOR	YOUR RATING	ACT WEIGHT	TOTAL
<p>6. THE CASE FOR THE PROGRAM HAS EMOTIONAL AND DRAMATIC APPEAL <i>In order to raise important funds, a project must be compelling and have sizzle! Otherwise, no matter how valid the need, you will not raise funds. If you feel the case can be dramatized in such a way that it tugs at both the heart and the purse strings, give yourself a '10'. Evaluate whether there is a sense of urgency and excitement and, if this is lacking, lower your score accordingly.</i></p>		7	
<p>7. THE ORGANIZATION HAS SUCCESSFULLY RAISED ITS OBJECTIVE IN ITS ANNUAL SUPPORT CAMPAIGN IN THE PAST TWO YEARS <i>A group that cannot raise annual support will not be able to mount a major capital campaign. If you have gone over goal in the campaign, give yourself a '10'. If you have just met goal, a '9'. Anything less than that, begin decreasing accordingly. If you do not have an annual campaign for sustaining funds, give yourself a '1'.</i></p>		5	
<p>8. THE ORGANIZATION HAS A CHALLENGING ANNUAL DOLLAR OBJECTIVE IN ITS ANNUAL CAMPAIGN WHICH FORCES IT TO STAND ON TIPTOES TO ACHIEVE ITS OBJECTIVES <i>It is not enough to merely reach your annual campaign goal, it has to be an objective that pushes you.</i></p>		3	
<p>9. A GENERAL RULE OF THUMB IS THAT YOU WILL BE ABLE TO RAISE TEN TO FIFTEEN TIMES THE FUNDS IN A CAPITAL CAMPAIGN THAT YOU HAVE BEEN RAISING ANNUALLY <i>Take the more liberal figure, fifteen, for instance. If your project needs to amount to more than fifteen times what you have been raising annually, you will find it difficult to meet your objective. You're going to have to do better on your annual campaign. If the total capital project equals fifteen (or less) of your annual giving, give yourself a '10'. The higher the numerical ratio between your capital needs and your annual giving, the lower your rating.</i></p>		5	
<p>10. THE ORGANIZATION MUST HAVE THE ABILITY TO MANAGE DONOR INFORMATION <i>It is essential that your donor base is in good order and your records are current, detailed, and complete. Your software can be used effectively and with ease—and provide the necessary information with speed and accuracy.</i></p>		1	

ASSESSMENT OF CAMPAIGN TIMING

ACT FACTOR	YOUR RATING	ACT WEIGHT	TOTAL
11. IN THE PAST TWO YEARS, YOU HAVE OPERATED WITHIN A BALANCED BUDGET <i>People give to organizations that are fiscally responsible and demonstrate proper financial stewardship. A balanced budget provides evidence of sound management and board accountability. Give yourself a '10' for a surplus and grade lower for an operating deficit.</i>		5	
12. YOU HAVE PREPARED A CAREFULLY DEVELOPED PROFORMA BUDGET AND HAVE PROJECTED THAT WHEN THE FACILITY IS COMPLETED, THE PROJECT WILL GENERATE SUFFICIENT INCOME TO MAKE IT SELF-SUPPORTING <i>Funds for the operation become increasingly more difficult and income has to be won. Major credit goes to the operation that has a significant percentage of its budget that is self-supporting. If the project demonstrates that it will generate significant income over expense, give yourself a '10'. And congratulations! If the campaign includes funds for endowment, increase your rating.</i>		4	
13. THE BOARD AND STAFF HAVE INDIVIDUALLY COMMITTED IN AN OPEN MEETING, WITH FULL DISCUSSION AND VERBAL VOTING, THEIR DEDICATION TO GIVE AND WORK SACRIFICALLY <i>It starts with the board and staff. If the organization's family doesn't care, why should anyone else?</i>		8	
14. THE BOARD IS ABLE TO GIVE INDIVIDUALLY (AND CORPORATELY IF IT IS A PERSONAL OR FAMILY-HELD COMPANY) 10% OF THE CAMPAIGN OBJECTIVE <i>Not every board is able to give as much as 10% and there have been many successful campaigns where this has been the case. But if the board is able to give 10% or better, it helps assure a victory for the project. If you believe that board members will be able to give 15% of the campaign objective, give yourself a rating of '10'. 10% of the giving should be a '9'. Anything lower than 10% should be evaluated accordingly.</i>		7	
15. YOU ARE ABLE TO DETERMINE OR IDENTIFY THE 20 MAJOR GIFTS THAT WILL PRODUCE 40% OF YOUR OBJECTIVE <i>The campaign cannot be successful without major gifts. If within your giving constituency, there is not the potential for receiving 40% of your objective from your top 20 gifts, your campaign is very likely moribund. And if you cannot identify these sources, you haven't started the campaign process. Give yourself a '10' if you have isolated these 20 sources. If, by the way, you are able to generate 40% of your objective with fewer than 20 sources—all the better!</i>		5	



ASSESSMENT OF CAMPAIGN TIMING

ACT FACTOR	YOUR RATING	ACT WEIGHT	TOTAL
<p>16. YOU HAVE IDENTIFIED AND LISTED THE 200 SOURCES THAT ARE MOST LIKELY TO PROVIDE THE LARGEST GIFTS FOR YOUR PROGRAM <i>It is quite likely that 80% to 90% of your funds will come from your top 200 sources. You need to determine now who these sources are. In addition and of importance, your top leadership should be developed from these sources. This truly becomes the heart and spirit of your successful campaign.</i></p>		4	
<p>17. DURING THE PAST 12 MONTHS, YOU HAVE MAINTAINED A WRITTEN PLAN TO ACTIVELY CULTIVATE YOUR TOP 200 SOURCES AND YOU HAVE MADE SIGNIFICANT CONTACT WITH EACH AT LEAST TWICE DURING THE YEAR <i>It's not good enough to just have the list—you need to be in contact with these sources, romancing your cause and your case. Give yourself a '10' if you have an active and effective program of prospect management and cultivation.</i></p>		9	
<p>18. ON YOUR BOARD, YOU HAVE A PERSON OF SUFFICIENT STRENGTH, STATURE, INFLUENCE, AND AFFLUENCE THAT HE OR SHE WILL BE A DESIRABLE CANDIDATE TO HEAD YOUR CAMPAIGN <i>It is not, however, necessary that you choose your chair from the board roster, but this often makes the selection easier and certainly more natural. If you do have this caliber of person on your board, it also says something about the power of the group.</i></p>		6	
<p>19. YOU ARE ABLE TO IDENTIFY SOMEONE OF SUFFICIENT STRENGTH, STATURE, INFLUENCE, AND AFFLUENCE WHO YOU FEEL WILL ACCEPT THE CHAIRMANSHIP OF YOUR CAMPAIGN PROGRAM <i>If you have been able to identify a person with the level of regard and esteem described, and they have already accepted the responsibility—you get roaring applause, and a '10'. Even if you haven't posed the question but you feel fairly certain that the man or woman of the caliber described will accept, give yourself a '10', and cross your fingers.</i></p>		5	
<p>20. YOU WILL BE ABLE TO RECRUIT SUFFICIENT VOLUNTEERS TO MOUNT A SUCCESSFUL CAMPAIGN EFFORT <i>While it is quite clear that your largest gifts will determine the level of your success, you will still require a broad base of giving to assure a victory. You will need a well trained, enthusiastic, and happy worker for every 5 to 8 prospects. Give yourself a full '10' if you feel you will be able to recruit the workers you need.</i></p>		3	



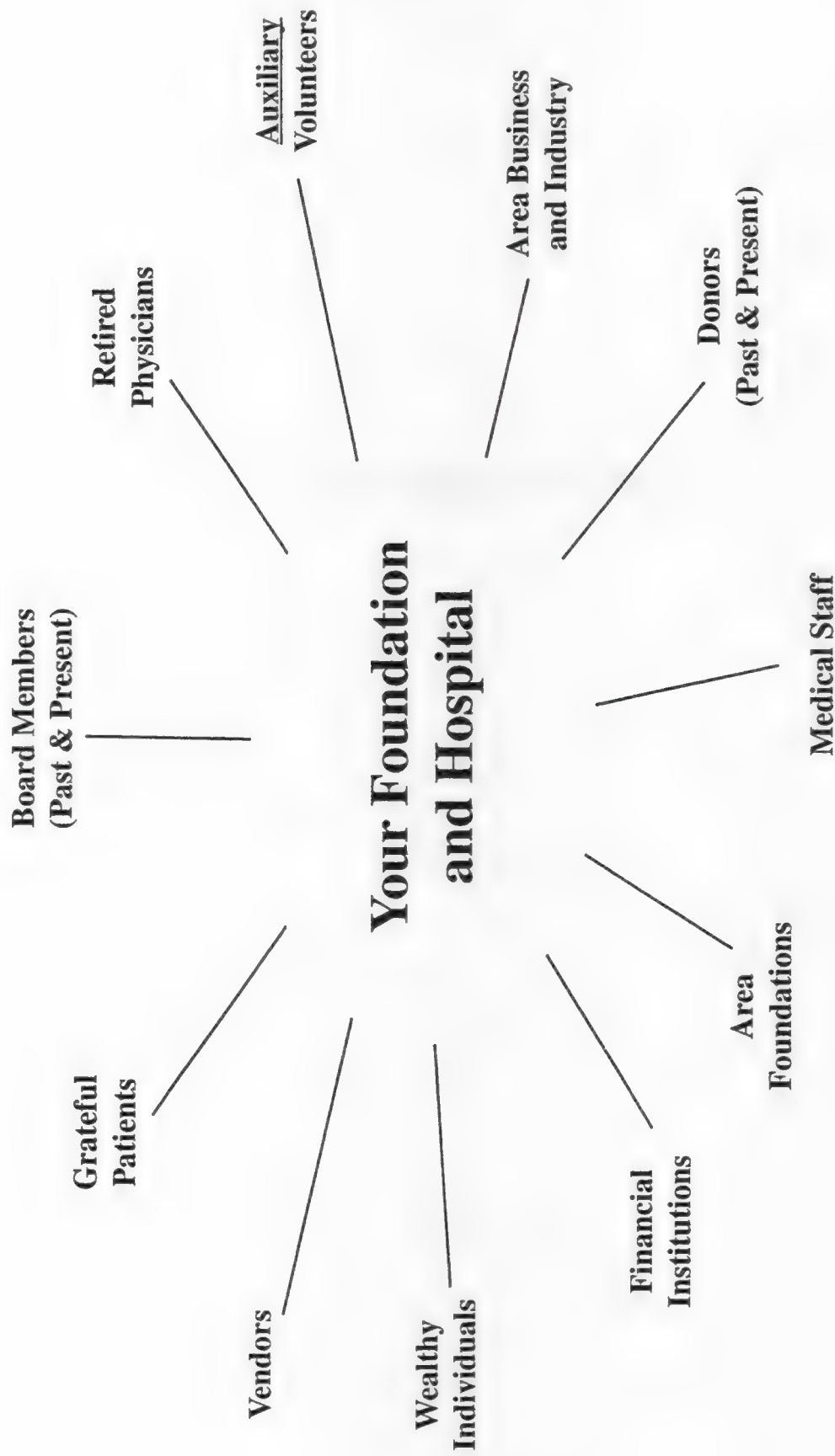
ASSESSMENT OF CAMPAIGN TIMING

ACT FACTOR	YOUR RATING	ACT WEIGHT	TOTAL
21. THERE SHOULD BE NO CAMPAIGNS IN YOUR SERVICE AREA BEING PLANNED FOR THE SAME PERIOD WHICH WILL CAUSE A SERIOUS CONFLICT <i>For your effort, you will require all of the dedication possible of volunteers, donors, and media coverage in order to win your effort. There are some campaigns, even of a major size, that will not interfere with yours—but if there are other organizations similar to yours in character and nature, this could cause a problem. If you do not anticipate a conflict, give yourself a '10'.</i>		2	

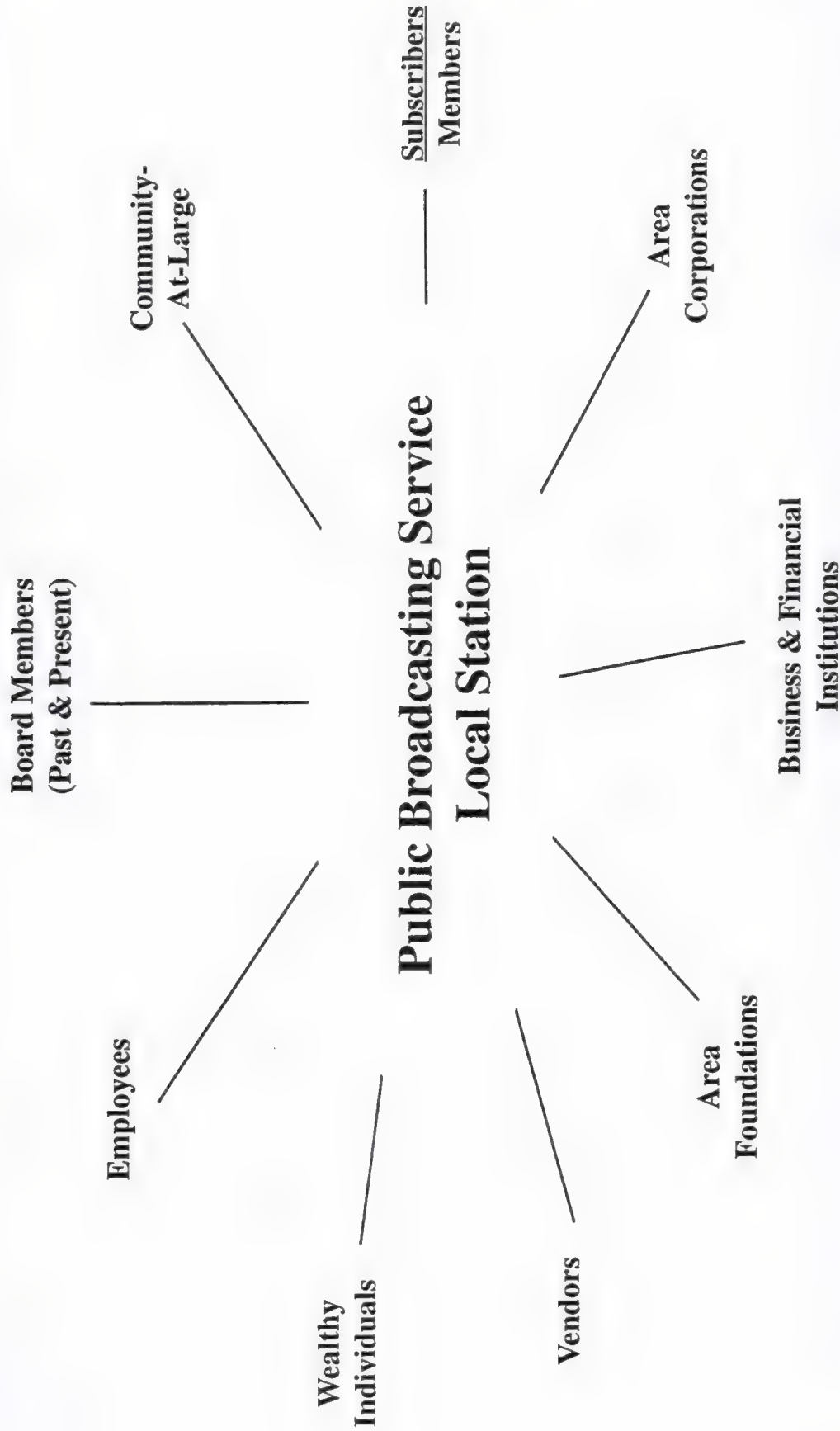
© Jerold Panas, Linzy & Partners
Revised 15 January, 1999

TOTAL THIS PAGE: _____

Your Giving Constituencies



“Affluence & Influence”



“Affluence & Influence”

Results

- ▶ Image and understanding
- ▶ Case for support
- ▶ Leadership

Results

▶ \$\$\$

How much

From whom

▶ Timing

▶ Strategy

Not 'If' ... But 'How'

CONSULTING FIRM

Experience

Feasibility Study Process

- Cultivation
- Case Statement (Left/Mailed)
- Reviewed

Interviews

- Staff Role
- Board Role
- Follow-Up
- Acknowledgements
- Thank You

TimeTable - 16 Weeks

Who will conduct interviews and *RoundTables*?

Cost?

PRELIMINARY TIME TABLE CHART

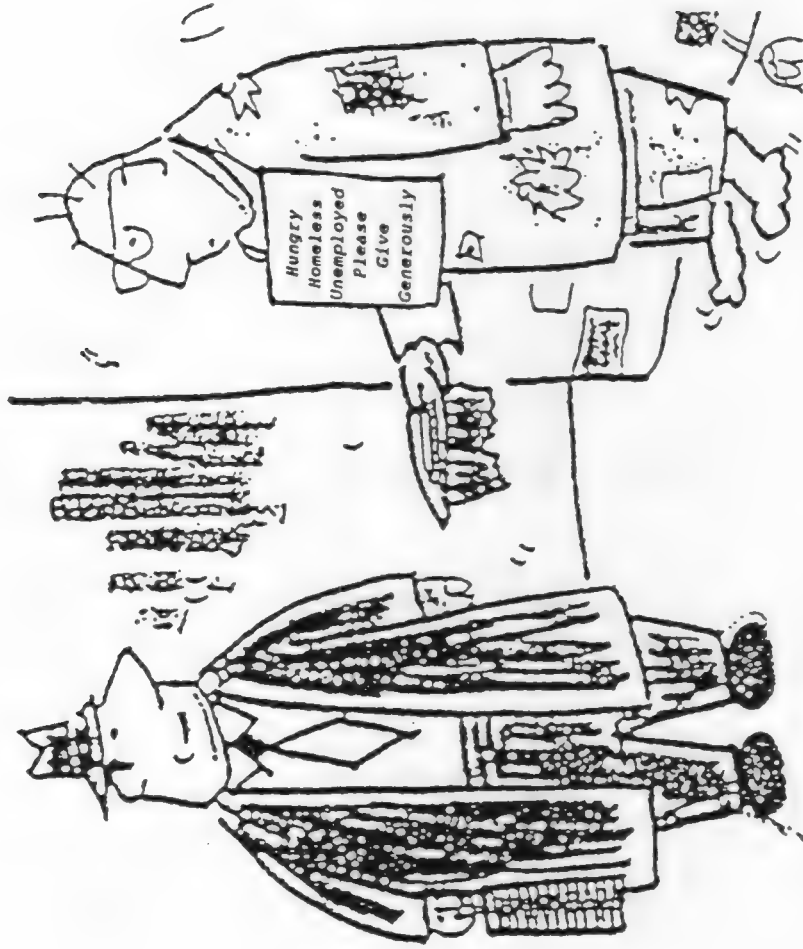
ORGANIZATION

WORK FUNCTIONS

WEEKS

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
FEASIBILITY/DEVELOPMENTAL ANALYSIS																
SELECTION OF NAMES																
Nominations & Research	•	•	•	x												
Selection				•	x											
APPOINTMENTS																
Letters for Appointments					x											
Calls for Appointments					•	x										
*Interviews and Round Tables							•	•	•	•	•	x				
CASE STATEMENT																
Writing	•	•	x													
Approval		•	x													
Design			•	x												
Printing				•	x											
REPORT & RECOMMENDATIONS																
*Review and Analysis of Data												x				
*First Draft of Report													x			
*Final Draft														x		
*Presentation to the Board															x	
*Presentation to Interviewees																x

KEY • Work in Progress
x Completed
* Involvement of Jerry Linzy



"I'm willing to give to you if I'm properly motivated by a Gase Statement that has high dramatic and emotional impact."

**At the heart of your case
statement, there must
be a description of your
objective and institutional
purpose—your very
special mission**

The statement should be understandable. If a sixth grader can read, comprehend, and explain the statement—you are probably on the right track.

**■ It describes the philosophy
and focus of your operation...**

**■ It is the platform which
launches your program.**



*"I think we should organize a campaign to raise money
for air conditioning. But first we need to write a Case Statement."*

The Nine Essentials You Have to Cover

Nine Essentials

1. The history of the organization
2. The fundraising plan
3. How to give
4. Leadership
5. The institution's unique role

Nine Essentials

6. The goals
7. The fundraising equation
8. The problem and opportunity
9. Proposed solution

Other Thoughts

- Use a team approach.
- Even the best writer can't overcome a weak institution.
- Speak very softly. It will sound like thunder.

Seven Ways a Case Statement is Used

A carefully conceived, well developed statement of your vision and need will assure that you:

ONE

Secure agreement, understanding, and commitment among your primary leaders and board members — so that there is total dedication to the cause and a precise focus of the institution's objectives and long-range goals.

TWO

Have a direction and a defined strategy for how to most effectively present your vision and your case to your primary constituencies.

THREE

Inform leaders and workers of your program and your dreams – and demonstrate how the success of the endeavor will work to the immense benefit of those you serve.

FOUR

Enlist new leaders to your
cause — in sufficient numbers
and at the proper level to win
the effort.

FIVE

Have an early working document and cultivation piece for prospective major donors.

SIX

Have a document that helps others endorse and share your vision – and accept greater and ever-expanding responsibility of identifying with your invincible mission and dreams.

SEVEN

Have a source book and guide for the writing of subsequent publication, articles, foundation proposals, and videotaped presentations.

Watch Out for the Six Pitfalls. They'll Bury You.

1. Undefined purpose
2. Overstated emotionalism
3. The pleading of needs

Watch Out for the Six Pitfalls. They'll Bury You.

4. Misunderstanding what motivates a prospect
5. Vague plans
6. Unsubstantiated grand claims



"Who the devil wrote this terrible Case Statement. It comes perilously close to the truth!"

CHOOSING THE RIGHT PERSON TO CHAIR YOUR CAMPAIGN

Selecting and recruiting precisely the right person to head your campaign program can be one of the most important decisions you make—a determining factor of the greatest significance for the success of your project.

Listed on this sheet are twenty-one criteria, essential characteristics in seeking a person to head your program. Grading is on a "one" to "ten" basis—10 being the highest mark.

Review each item and give it a rating. Where the factor has an extra weight, multiply your evaluation times the weight. Take #1, for instance. Let's say you gave that factor a rating of 7. The weighted importance is 2. The final figure you list in the right hand column is 14 (2 x 7).

While perfection may be impossible, you should certainly seek the most effective person available. A perfect rating is 275.

The criteria are not listed in order of priority, although several are given added "weight" because of their importance.

The Idea
People

**Jerold Panas,
Linzy & Partners**
Consultants to Philanthropy

500 North Michigan Avenue
Chicago, Illinois 60611
800-234-7777 • 312-222-1212

Name of Prospective General Campaign Chairperson

Score 1 to 10...
ten being the
highest

- 1 Is an outstanding citizen, a well-known and respected civic leader, with high visibility. *(Count two times the rating.)*
- 2 Occupies the top position in his or her firm, or at least no less than the next highest position.
- 3 Because of the kind of person you seek, business and pleasure may often take him or her away from the city. This need not be a deterrent. The important factor is that when in the city, there is some flexibility and "give" in their schedule.
- 4 Should not be the chair of your institution, and often it is desirable that he or she is not currently a member of the board.
- 5 It is highly desirable that the candidate be knowledgeable about the institution, but even this need not be necessary if there is the willingness to take the time to learn about the program.
- 6 The person should be a good public speaker—though he or she need not chair every meeting. Most importantly, the candidate must be sincere and convincing when speaking about the institution.
- 7 Is the person in the community to whom it is the most difficult to say "no." *(Count three times the rating.)*
- 8 Has the ability to make or influence a number of major gifts. *(Count three times the rating.)*
- 9 Has those characteristics in his or her personal and business life which make their identification with the institution a desirable one. *(Count 1 1/2 times the rating.)*
- 10 Is a willing and enthusiastic delegator of responsibility.
- 11 Has an office staff capable of handling some of the telephoning and details of the campaign.
- 12 Does not have a primary identification with any other similar institution and should not have recently chaired another major drive.
- 13 Is not retired, although the prospective chair may now have reached the point where he or she is not as active in business as they once were.
- 14 Is willing to give the campaign priority in his or her personal, business, and civic schedule. *(Count two times the rating.)*
- 15 Is capable of seeing "the big picture" and leaving details and office mechanics to the campaign staff.
- 16 Is a secure person with a healthy personality and a high level of self-esteem.
- 17 The candidate is willing to lend more than his or her name to the campaign, although the name in itself adds luster to the total effort.
- 18 Is conscious of deadlines and schedules.
- 19 Is a team player, willing to listen and work with others.
- 20 The person enjoys good health and stamina.
- 21 Knows how to use and encourage good staff work.
- 22 Must be capable of enduring an insufferable number of roast chicken dinners. *(Count no points!)*

TOTAL

262-275 points - An extraordinary choice. You cannot miss! Your campaign will be a success.

243-261 points - An excellent selection. Take all the care possible in recruiting this person. A victory is almost certain.

192-242 points - A good choice, but you may have problems in recruiting some of the other leadership you require to reach your objective.

184-191 points - Marginal, but with the proper commitment and dedication, he or she may overcome deficiencies in other areas.

The Capital Campaign Plan

- Campaign organization and structure
- Campaign leadership
- Final case for support
- Campaign timeline

The Capital Campaign Plan

- Budget
- Campaign public relations and material
- Solicitation training

The Role of the Board In Your Campaign

The Role of the CEO In Your Campaign

Role of the Campaign Director

- Development of an overall, written action-plan for the campaign – specified and detailed.
- Determination of the proper strategy and a time-phased plan which will evolve in a comprehensive campaign calendar.

Role of the Campaign Director

- Develop the campaign budget.
- Development of all communication materials for information and cultivation of the various constituencies.

Role of the Campaign Director

- Final determination, with you and your key people, of the overall campaign organization.
- Identification and recruiting of the strongest Campaign Cabinet and Advisory Board possible. These are two distinct groups, each with their own function.

Role of the Campaign Director

- Determination and help in the enlistment of the most effective leadership possible – for each division in the campaign.
- Development of the necessary collateral campaign materials: pledge cards, Letters of Intent, and all other materials necessary for the solicitation program.

Role of the Campaign Director

- Search for foundation sources and prepare all necessary proposals.
- Preparation of proposals and Letters of Request for all prospective donors.
- Search and preparation of an extensive prospect list.

Role of the Campaign Director

- Evaluation and segmentation of the prospect list so that levels of giving are appropriately placed.
- Development of the very best strategies for all major gift prospects.
- Enlistment and training of all leaders and workers who will be making solicitation calls.

Role of the Campaign Director

- Development of the campaign plan, organization, and structure for a comprehensive effort — with one-on-one solicitation.
- Development of effective campaign material and all necessary collateral pieces in order to most effectively reach each segment of the organization's giving constituencies.

Role of the Campaign Director

- Coordination of the effort and energy of all campaign leaders.

Capital Campaign Consultants

Why Engage a Consultant?

- Provide experience and perspective
- Help maintain objectivity and focus
- Assist in maintaining a winning attitude and momentum

Why Engage a Consultant?

- Help identify strengths and weaknesses . . . and help build on strengths and correct or neutralize weaknesses
- Identify and emphasize key success factors . . . be the insistent voice

Why Engage a Consultant?

- Back-up and support campaign and permanent staff
- Provide a context and guidance for planning
- Help volunteers maximize their effectiveness and concentrate on important matters

How to Engage a Consultant

- Carefully assess your situation and put it on paper
- Ask two or three consultants you know and trust to respond to your situation and needs

How to Engage a Consultant

- Respect consultants who do their homework, who know your organization before they propose an engagement
- Know the difference between the “canned” proposal and one that includes the twenty percent (or so) that makes a difference

How to Engage a Consultant

- Clearly spell out expectations, constraints, obstacles, and any “special conditions” you or your situation impose . . . assume nothing
- Make a choice and tell everyone concerned

How to Engage a Consultant

- Get to know consultants before you need them
- Get agreement among staff and volunteer leaders that a consultant can be helpful and will broaden your capacities

How to Engage a Consultant

- Never forget that you are buying a consultant's system to achieve your goals and the ability to implement that system
- Remember that consulting is a business

How to Engage a Consultant

- Negotiate a contract that enables success, not one that limits everyone concerned
- A consultant is like your doctor or lawyer ... be honest, respect their professional judgement, take their advice, or find another, more productive relationship

How to Engage a Consultant

- Mutual advantage encourages the symbiosis that makes the whole worth more than the sum of the parts
- Give prospective consultants an opportunity to connect to leaders

How to Engage a Consultant

- Key aspects of any good relationship are mutual respect and mutual advantage
- Communicate your respect to your leaders

How to Engage a Consultant

- Manage the relationship with your consultant the way you would any other business relationship

Campaign Counsel Shouldn't

- Propose a fee based on percentage, commission, or other arrangement which conflicts with the professionalism of fundraising consultancy
- Be expected to or imply they can perform miracles

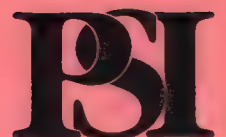
Campaign Counsel Shouldn't

- Usually become involved in soliciting gifts
- Be seen as a substitute for key volunteers or staff leaders in seeking philanthropic support

Marketing Philanthropy

Presented by: Corina Car

1999 Conference on Philanthropy



Major Gifts: A Love Story

Presented by: Jerry Linzy

1999 Conference on Philanthropy



**THE ROLE OF MAJOR GIFTS
IN THE FUNDRAISING PROCESS**

**Presentation By:
Jerry A. Linzy**

**PSI-Adventist World Headquarters
Silver Springs, Maryland**

**The future will belong
to major and planned gifts**

Major gift programs require a number of specific elements:

- Public relations
- A commitment from your organization to provide resources and leadership
- An annual giving program

Major gift programs require a number of specific elements:

- A strong, compelling case for giving — or several cases for giving
- Staff
- A Board of Directors and other strong volunteers

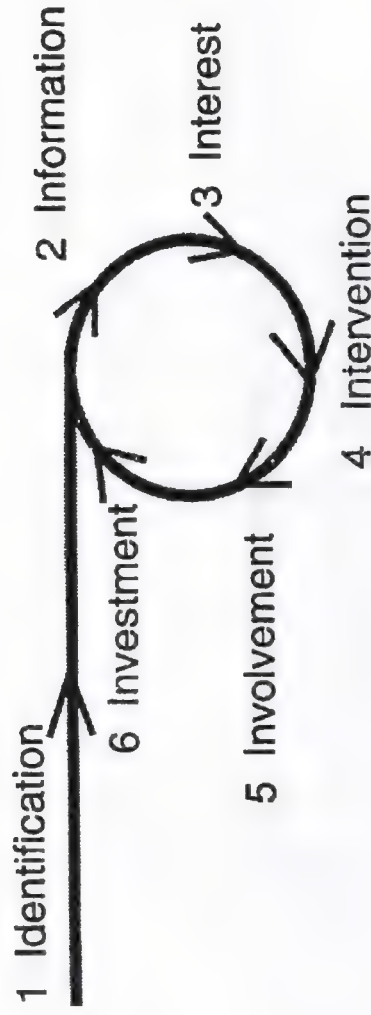
Major gift programs require a number of specific elements:

- Prospects
- A gift evaluation process
- Donor management

OTHER ELEMENTS

- Identify and evaluate your top prospects
- Create a donor management system
- All staff and volunteers must be involved in a major gift program

A major gift program is oriented toward cultivation and nurturing relationships



Building Relationships

- Identification and initial contact with a potential major donor is only the beginning of the development process.
- Educate and encourage the donor to support your organization.
- Then the donor translates new found commitment into personal current and planned giving, as well as charitable recruiting of others.

Building Relationships

- “...the charities I respond to are those that ask a lot of questions about what I’m interested in and then tell me just how they could fit into that...”
- “...they sent someone I know to talk to me who was able to explain what the charity was about in a way that made perfect sense to me...”

Program Quality and Donor Satisfaction

- Strive to satisfy current donors.
- Ask donors for regular feedback on how they view their relationship with your agency and how satisfied they are.
- Create a response management program to deal with negative feedback to turn dissatisfied people into loyalists.

Preparing for a major gift program

- Develop an action calendar that indicates what is to be done, when, and by whom
- Put into place policies and procedures to assure a working process for your campaign

At least once a year step back from the day-to-day work of your major gift program and ask yourself:

- **Are the initiatives the program generates consistent with your institution's strategic plan?**
- **Has each prospect been asked for an annual gift?**

At least once a year step back from the day-to-day work of your major gift program and ask yourself:

- Has each prospect received the quality, quantity, frequency, and continuity of initiatives desirable?
- Has there been an appropriate distribution of initiatives among the prospects?

At least once a year step back from the day-to-day work of your major gift program and ask yourself:

- Does each prospect have the most appropriate prime and secondaries?
- Is the staffing and budget appropriate to the needs of your program?

At least once a year step back from the day-to-day work of your major gift program and ask yourself:

- Are you working the right number of prospects?
- Are the prospects selected the right ones?

**There are those
waiting to be asked.**



Annual Fund Gift			Major Gift	Ultimate Gift
Purpose	Operational Needs	Buildings, Equipment, and Endowment	Primarily Endowment	
Types	Sustaining Gifts	Special and Major Gifts (10 to 25 times Annual Gift)	Generally Once-in-a-lifetime Expressions of Support (1,000 to 2,000 times Annual Gift)	
Characteristics	Frequently Given Frequently Asked For Decision is Rational, Cerebral Decision Made Quickly Decision Can Usually be Made Without Professional Assistance Decision Often Made Without Spouse Approval	Infrequently Given Infrequently Asked For Decision Becomes Emotional, Visceral Stop-and-Think Gift Takes Longer for Decision Nurturing Fundraising Spouse Almost Always Involved	May Involve Combination of Giving Methods, Often Deferred Long Term Relationship Building Decision Becomes Increasingly Emotional Takes Longer and More Study for Decision Receives Professional Input from Others The Consequences of a Poor Decision Become Greater	
Strategy	Sell Special Packages Special Projects & Activities Seek Broad Based Support and Peer Involvement Begin Lifelong Relationship Acquire, Renew, Upgrade Little Cultivation Required CULTIVATE	Market Institution's Mission & Special Opportunities Focus on Select Audience (Financial Capability + Interest + Involvement) Foster Strong Personal Relationship Leverage Association of Staff, Partners, Volunteers Prior and Regular Cultivation CULTIVATE	Total Commitment to Institution's Mission Estate Planning Service & Special Opportunities Educate Prospects Regarding Planned Giving Vehicles Create Bonding Relationship Leverage Close Relationships of Staff, Partners, Volunteers Intensive Cultivation CULTIVATE	ASK
Methods	Direct Mail Telethon Mass Marketing Special Events Local and Community Programs Personal Solicitation of Prospects Affinity Programs	Personal Solicitation (several contacts) Special Events (to focus attention and cultivation) Direct Mail (for information, cultivation) Initiation of Stewardship	On-Going Stewardship Personal Solicitation (a number of contacts) Educational Seminars Direct Mail and Topical Newsletters (for information, cultivation) Special Projects and Events for involvement and cultivation	
Recognitions	Giving Clubs Plaques, etc.	Naming Opportunities Lifetime Giving Recognitions Wall "Hall of Fame"	Heritage-type Club Naming Opportunities Lifetime Giving Recognitions	

Performance Goals for Major Gift and Planned Giving Officers[®]

Standard	Total Calls per Week	# Cold Calls Per Week	# Cultivation Calls Per Week	# Stewardship Calls Per Week	Asks Made or Proposals Delivered Per Month	Gifts Secured Per Month	Dollars Secured Per Year
excellent	10-15	2-3	5-10	no less than 1 or more than 2	7-10	6	\$1 Million
average	7-9	2	3-5	no less than 1 or more than 3	4-6	5	\$750,000
minimum	5-6	1	2-3	no less than 1 or more than 4	2-5	3	\$500,000

• The Major/Planned Gifts officer should be:

- acquainted with 400-500 people
- able to handle 100 to 150 prospects, including donor stewardship and maintenance
- able to manage 50 to 75 prospects with 7 to 10 MOVES per year

• A call is consciousness penetration with the prospect regarding your organization. A move is a planned contact with a fixed action and objective. It may be accomplished by letter, telephone, or personal visit. The target with good prospects should be one call (MOVE) per month (12 per year) with at least 4 to 5 of those in the form of a personal visit.

- Stewardship calls are essential, but must not take the place of prospecting and gift enhancement. That is why they receive diminishing priority in the standards.

3/25/98

er

ASSURING YOUR SUCCESS

The Cultivation Cycle
and the
T•A•G Process



THE CULTIVATION CYCLE AND THE T•A•G PROCESS

Four Principles

The concept rests firmly on four principles fundamental to successful major gift cultivation:

- 1) Development is a very simple business. We have only two objectives:
 - a to help create an understanding of the special mission, value, and accomplishments of a particular cause or organization; and
 - b to secure the necessary support in the form of goodwill and dollars to sustain and advance the institution.
- 2) Development is far more than a material concern for money. In fact, fundraising itself is more psychological—even spiritual—than it is financial. It is the human spirit and its aspirations that are our primary concern.
- 3) Most gift support should and usually will come from those closest to us—normally trustees, alumni, present donors, etc. As the late Francis Pray observed some years ago, *Around every (nonprofit organization) in this country there is a group of men and women, ranging in size from a half dozen to a few hundred, who literally hold in their hands the make or break power for the institution itself.* This “power” is in large measure economic as reflected in the gifts of those who have reason to care most deeply about causes to which they are committed.

The single most important function in a successful development program is the cultivation of major gifts. One of the persistent truths is that relatively few donors provide the bulk of total gift dollars.

Traditionally, it had been thought that roughly 80 percent of the money in any fundraising program is contributed by 20 percent of the donors. This long-standing 80:20 ratio is clearly an understatement. Today, the ratio is likely 90:10—or even more heavily weighted toward the larger gifts.

The fourth principle is perhaps the most significant:

- 4) Since 90 percent or more of the total gift is normally received in the form of very special and major gifts, a proportionate share of resources (staff, time, and budget) should be allocated accordingly.

There are few fundraising professionals or nonprofit organizations applying this principle fully. But any organization that does will, within a relatively brief time, far exceed its present level of gift support.

Cultivation Cycle

To cause such a turnaround will, in most instances, require the force of the president or chief executive. This should be done by edict and example—followed by careful redirection of the development program.

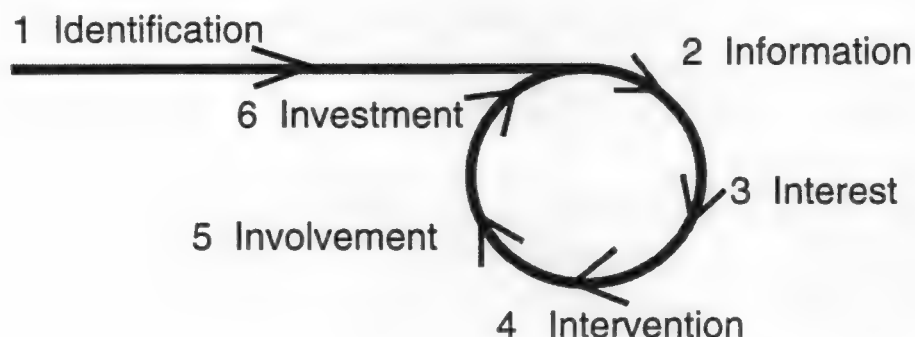
Here is a rather simple procedure to follow in implementing a program of special and major gift cultivation. Let us say that special gifts are defined as from \$1,000 to \$10,000, and major gifts as above \$10,000.

The cultivation of potentially large donors is a systematic and continuing effort to develop the power structure of an institution. It involves six steps, all of which begin with the letter “I”:

- 1 Identification
- 2 Information
- 3 Interest
- 4 Intervention
- 5 Involvement
- 6 Investment

In nearly every instance, the final six steps comprise a continuing cycle of learning additional information about the potential donor (step 2); furthering his or her interest (step 3); intervening—finding systematic reasons to *get in their way* on a regular basis (step 4); encouraging a meaningful involvement (step 5); and, ultimately, receiving added financial investment (step 6).

Widely recognized now as *The Cultivation Cycle*, this process may be visualized as follows:



There is an important additional step not listed here—but it is immensely significant. When an investment has been made, the donor should be asked to work with you in soliciting others.

Implementation

You know best how such an effort might be initiated within your own situation. We suggest, however, that the following steps be put into practice:

- 1) Determine that the role and function is of primary importance. Secure the concurrence of the Chief Executive and the Development Committee of the Board of Trustees. There must be agreement and a clear understanding by Trustees and Staff.

- 2) Assign the Chief Development Officer full responsibility for **T•A•G** and, where appropriate, designate a development staff officer as the *Manager* (see page 5) or the **T•A•G** Nag!
- 3) Establish a simple and clear-cut procedure for implementing the Cultivation Process. To begin with, one should:
 - a Make an **initial list** of all known potential major and special gift donors and gather as much information on each as is readily available.
 - b Assign an estimate of **Gift Potential** for each potential donor, using four categories. The dollar range for each category should be appropriate to each situation. We suggest you use the following amounts for the various categories:
 - 1 \$1 million and up
 - 2 \$100,000 to \$1,000,000
 - 3 \$10,000 to \$100,000
 - 4 \$1,000 to \$10,000
 - c Determine **Readiness to Give** of each potential donor, using four levels:
 - A Ready to Invest (or reinvest).
 - B Needs some cultivation.
 - C Needs extensive cultivation
 - D Only marginal interest
 - d Within each category, (see b on this page), **rank in order** of potential importance (1-A, 1-B, 2-A, 2-B . . .).
 - e Beginning with the top 10 in the highest category, estimate the **cultivation requirements** for each.

For example, the top 10 should probably have an average of 10-12 cultivation contacts or "tags" a year. The next 20 should have 8-10, the next 30 should have 6-8, and the next 40 should have 4-6.

This total of 600-800 *tags* with the top 100 potential donors is about all that one person can handle if 80-90 percent of his or her time is spent in major gift cultivation. (A *tag* is defined as the *meaningful* engagement of or interaction with a potential donor.)

- 4) Plan specific cultivation tags for each potential donor as far in advance as possible, making use of the six-step *Cultivation Cycle* (see sample six-month Cultivation Schedule attached).

T•A•G Management

Detailed information on each potential donor and a cultivation tracking system should be maintained by those specifically responsible for major gifts. Once a manual system has been established (see sample Cultivation Summary attached), information and data can be maintained and processed by computer.

The regular and disciplined tracking of each potential donor is essential to significant major gift results. This can be facilitated by use of Call Reports (sample attached) and by regular weekly review and planning sessions involving all those (including the Chief Executive Officer) concerned with major gifts.

One final word relating to the Cultivation Process: This has to do with the 6th step of the Cycle—the Investment phase. Even after going through all of the preliminary cultivation steps, it is not an uncommon fault in many to want to avoid, if at all possible, asking for the gift. You must not lose sight of the objective—that securing the gift is the natural, as well as hoped for, end result of the cultivation process. And the best part of all of this is that the donor experiences the joy of giving and is deeply enriched.

TO BE INTERVIEWED



Date

Time

Location

RANK: _____
(to be completed by interviewer)

NAME: _____

Business:

Title	Telephone	
Company		
Address		
City	State	Zip

Home:

Address		
City	State	Zip
Telephone		

Relationship with Organization: _____

Giving History with Organization: _____

Giving to Other Organizations: _____

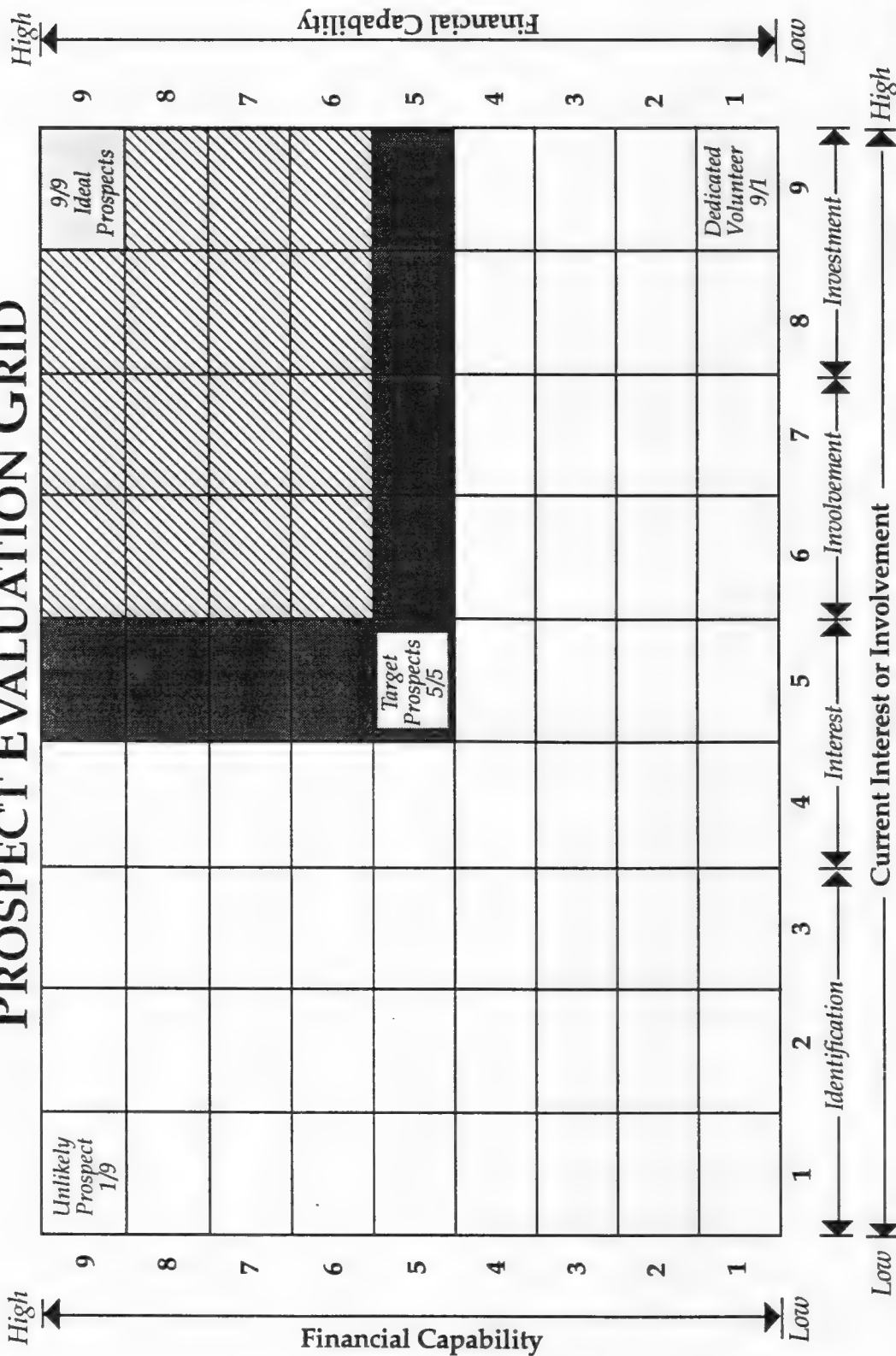
Personal Data: *(Church, University, Spouse, etc.)* _____

Family History: _____

Possible Objections or Problems: _____

Special Strategy or Instructions: _____

PROSPECT EVALUATION GRID



PEG Ranking for Major Gift
(total of both numbers)

2-6	Very Poor Prospect
7-10	Marginal
11-12	Fair
13-14	Good
14-17	Very Good
17-18	A Superb Prospect!

Target Market

Major Gift Prospects

Ideal Prospects

Description of Prospects

Negligible Interest/Little Capability

Negligible Interest/Great Capability

Beginning of Target Market

Very Involved/Negligible Capacity

Prospect

5/5 and above

6/6 and above

6/6

Grid Location

III

6/1

515

9/1

Guide—Current Interest/Involvement

1 Not on mailing list
2-3 Some identification
4-5 Has demonstrated some interest
6-7 Has been involved
8-9 Heavily involved or
significant record of giving

Name _____

Ranking (total of both numbers)

(NAME OF INSTITUTION)

Six Month Schedule
January - June
Date prepared: _____

Classification Codes

	1 \$1 Million and Up	A Ready to invest	PEG	L Letter
2 \$100,000 - \$1,000,000	B Needs some cultivation	17-18	Superb Prospect	T Telephone
3 \$25,000 - \$100,000	C Needs extensive cultivation	14-17	Very Good	P Personal Visit
4 \$1,000 - \$25,000	D Marginal interest	13-14	Good	
9 To be determined	E To be determined	11-12	Fair	

Name	Phone	Code	Gift Objective	Calendar																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																		
				January							February							March							April							May							June																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																															
				1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29

State of Philanthropy at Adventist Organizations

Presented by: Ken Turpen, CFRE

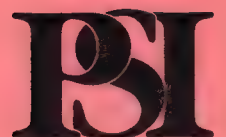
1999 Conference on Philanthropy



Survival Skills for the 21st Century

Presented by: Sean Joyce

1999 Conference on Philanthropy



The
Ministry of
Philanthropy

Section 6

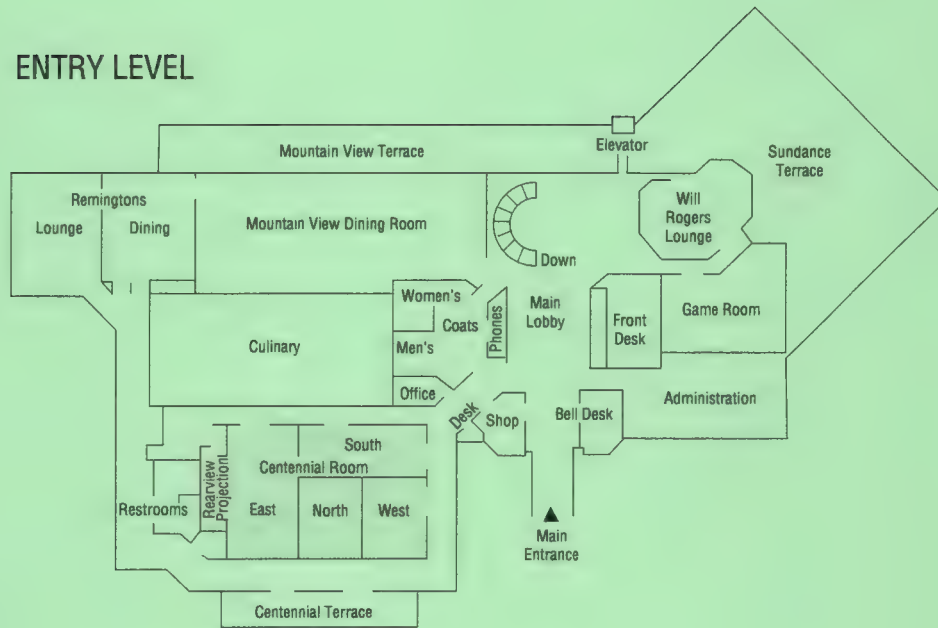
1999 Conference on
Philanthropy



BI

Miscellaneous

ENTRY LEVEL



CONFERENCE LEVEL



Mountain View Dining Room Hours

Breakfast—6:30-10:00
 Lunch—11:00-2:00
 Dinner—5:00-10:00
 Sunday Brunch—10:30-2:00

Eighth Conference on Philanthropy Planning Committee

PSI extends a huge thank you to the conference planning committee and especially to Carolyn Hamilton, the chair. They all gave significant time to creating a conference that would be the most beneficial to you. We simply couldn't have done it without them. Thank you all very much.



Carolyn Hamilton of Hamilton & Associates, chaired the planning committee for this conference. She did an incredible job.



Christopher Gaines, director of development for Campion Academy, teamed with Kellie Lind coordinating the social and hospitality aspects of the conference.



Ed Ammon, CFRE, director of annual giving at Walla Walla College, was responsible for the session tracks dealing with techniques.



Elaine John is director of marketing and development for St. Helena Hospital. She worked with David Kinsey to develop the dynamite round tables.



Jackie Bragaw, director of development at Enterprise Academy, helped to coordinate the conference Showcase of Ideas session.



David Kinsey is a grantwriter for Loma Linda University. He worked with Elaine John and brought a lot of creativity to the round tables.



David Burghart, CFRE, vice president for development at Southern Adventist University, coordinated the Ministry of Influence devotional track.



Kellie Lind, director of alumni and development, along with Chris Gaines coordinated the social and hospitality aspects of the conference.



Christopher Carey, CFRE, director of corporate and foundation relations at Andrews University, coordinated the mentoring aspects of the conference and the Showcase of Ideas session.



Jeannette Regalado, director of development for Walla Walla Valley General Hospital, coordinated the session tracks dealing with relationships.



Mary Anne Chern, ACFRE, FAHP, president of White Memorial Medical Center, was responsible for the session tracks dealing with fundamentals of philanthropy.



Philanthrobee, mascot for Seventh-day Adventist philanthropy professionals, coordinated anything that seems a little bit crazy about this Conference on Philanthropy.

Five Minute *Philanthropic Dollar* Survey

Describe the way you read the following sections of the *Philanthropic Dollar*:

	Read all		Read some		Don't read	
Challenge	1	2	3	4	5	6
Healthcare	1	2	3	4	5	6
Education	1	2	3	4	5	6
Gifts & Grants	1	2	3	4	5	6
Philosophy of Philanthropy	1	2	3	4	5	6
Feature	1	2	3	4	5	6
Philanthropic Digest	1	2	3	4	5	6
Conferences	1	2	3	4	5	6
People	1	2	3	4	5	6
Job Placement	1	2	3	4	5	6

If you could change anything about the *Philanthropic Dollar* what would you change?

Other Comments:

What is your favorite part of the *Philanthropic Dollar*? _____

Rate the *Philanthropic Dollar's* performance in the following areas: (1=Exquisite 6=Awful)

Selection of Topics	1	2	3	4	5	6
Quality of Writing	1	2	3	4	5	6
Appearance	1	2	3	4	5	6
Readability	1	2	3	4	5	6
Overall organization	1	2	3	4	5	6

Your Organization:

- ☐ Hospital ☐ College/University ☐ Academy
☐ Other _____

Occupation: _____

You Name & Address (optional):

What do you do with your copies of the *Philanthropic Dollar*?

- ☐ Circulate them ☐ Save them ☐ Discard them

Thank you! Please drop in the survey box at the hospitality desk.

You don't Receive the *Philanthropic Dollar*?

If you do not get a copy of the *Philanthropic Dollar*, or you know someone else who doesn't but should, write the information below and we'll add it to the mailing list. It's a free subscription for PSI members.

Name _____ Title _____

Organization _____

Address _____

City _____ State _____ Zip _____

Suggestions

or compliments!

Your name or institution optional _____

Suggestions

or compliments!

Your name or institution optional _____

The Ministry of Philanthropy

Eighth Conference on Philanthropy Final Evaluation

Circle the number that best represents your opinion:

Location (city)	just awful	1	2	3	4	5	superb
Location (conference center)	just awful	1	2	3	4	5	superb
Lodging	just awful	1	2	3	4	5	superb
Meals	just awful	1	2	3	4	5	superb
Meeting Rooms	just awful	1	2	3	4	5	superb
Session Topics	just awful	1	2	3	4	5	superb
Speakers	just awful	1	2	3	4	5	superb
Printed Program	just awful	1	2	3	4	5	superb
Length of Conference	just awful	1	2	3	4	5	superb
Dates of Conference	just awful	1	2	3	4	5	superb
Trailblazer Banquet	just awful	1	2	3	4	5	superb
Round Tables	just awful	1	2	3	4	5	superb
Morning Worships	just awful	1	2	3	4	5	superb
Devotionals	just awful	1	2	3	4	5	superb
Book Signings	just awful	1	2	3	4	5	superb
Value to You Professionally	none	1	2	3	4	5	a lot
Will You Attend in 2001	no way	perhaps	I'd like to	probably will	you bet		

What Most Affects Your Decision to Attend the PSI Conference? _____



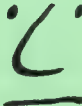

Additional Comments: _____

Your Name (optional) _____

Presentation Evaluation

1999 Conference on Philanthropy

Name of Presenter _____

 Please rate the presentation on a scale of 10 (highest) to 1										
	10	9	8	7	6	5	4	3	2	1
Relevant to my needs:										
Strength of material:										
Persuasiveness:										
Learn anything new?										
Delivery:										
Audio/Visual										





Comments, reactions: _____

Signed: (Optional) _____

Presentation Evaluation

1999 Conference on Philanthropy

Name of Presenter _____

 Please rate the presentation on a scale of 10 (highest) to 1										
	10	9	8	7	6	5	4	3	2	1
Relevant to my needs:										
Strength of material:										
Persuasiveness:										
Learn anything new?										
Delivery:										
Audio/Visual										





Comments, reactions: _____

Signed: (Optional) _____

Presentation Evaluation

1999 Conference on Philanthropy

Name of Presenter _____

 Please rate the presentation on a scale of 10 (highest) to 1										
	10	9	8	7	6	5	4	3	2	1
Relevant to my needs:										
Strength of material:										
Persuasiveness:										
Learn anything new?										
Delivery:										
Audio/Visual										

Comments, reactions: _____

Signed: (Optional) _____

The
Ministry of
Philanthropy

Section 7

1999 Conference on
Philanthropy



BI

Roster

1999 Conference on Philanthropy

Roster

A

Ms. Sallie J. Alger
Director of Major Gifts
Andrews University
10524 Concord Drive
Berrien Springs, MI 49103
PH: 616-471-6664
FX: 616-471-6543

Mr. William Allen
Director of Development for Major Gifts
La Sierra University
4700 Pierce Street
Riverside, CA 92515-8247
PH: 909-785-2307
FX: 909-785-2478

Mr. Joseph Allison
Principal
Sunnydale Adventist Academy
6818 Audrain Road 9139
Centralia, MO 65240
PH: 573-682-2164
FX: 573-682-3136

Mr. Edward Ammon, CFRE
Director of Annual Giving
Walla Walla College
204 S College Avenue
College Place, WA 99324
PH: 509-527-2141
FX: 509-527-2398

Ms. Ann Axt
Director of Development
Portland Adventist Academy
1500 SE 96th Avenue
Portland, OR 97216
PH: 503-255-8372 ex 238
FX: 503-255-5132

Ms. Cheryl Barber
Development Officer
Florida Hospital Fish Memorial
1061 Medical Center Dr., Ste 313
Orange City, FL 32763
PH: 904-917-5423
FX: 904-917-5425



B

Dr. Peter Bath
President
Kettering College of Medical Arts
3737 Southern Blvd.
Kettering, OH 45429
PH: 937-296-7218
FX: 937-297-8106

Ms. Nicole Batten
Development Associate & STEP/UP
Mount Pisgah Academy
75 Academy Drive
Candler, NC 28715
PH: 828-667-2535 ex 220
FX: 828-667-0657

Mr. Troy Beans
Athletic Director
Campion Academy
300 SW 42nd Street
Loveland, CO 80537
PH: 970-667-5592
FX: 970-667-5104

Ms. Rebecca Becker
Development Director
Andrews Academy
200 Garland Avenue
Berrien Springs, MI 49104-0560
PH: 616-471-6140
FX: 616-471-6368

✓ Ms. Heidi Bell
Asst. Director of Advancement
Atlantic Union College
PO Box 1000
S. Lancaster, MA 01561
PH: 978-368-2343
FX: 978-368-2015

Mr. Henry Berkner
Director of Development
Chisholm Trail Academy
Box 717
Keene, TX 76059
PH: 817-641-6626
FX: 817-556-2009

Ms. Elaine Bernard
Director of Development
Crawford Adventist Academy
531 Finch Avenue West
North York, ON M2R 3X2 Canada
PH: 416-633-7678
FX:

Ms. Jeannette Betlinski
Director of Development
Mount Ellis Academy
3641 Bozeman Trail Road
Bozeman, MT 59715
PH: 406-587-5178
FX: 406-587-5170

Mr. Richard Bland
President
United Prison Ministry
PO Box 8
Verbena, AL 36091
PH: 205-755-4744
FX: 205-755-4774

Mr. Dave Bowers
Director of Development
Thunderbird Adventist Academy
7410 E. Sutton Drive
Scottsdale, AZ 85260
PH: 480-948-3300
FX: 480-443-4944

Mr. Eddie Braga
Vice President, Marketing & Recruiting
Florida Hospital College
800 Lake Estelle Drive
Orlando, FL 32803
PH: 407-895-7894
FX: 407-895-7680

Ms. Jackie Bragaw
Director of Development
Enterprise Academy
PO Box 215
Enterprise, KS 67441-0215
PH: 785-263-8211 ex 107
FX: 785-263-8368

Mr. Jim Brown
Vice President
Western Adventist FOUNDATION
2686 Towns Gate Road
Westlake Village, CA 91361
PH: 805-497-9457
FX: 805-497-0660

Mr. David Burghart, CFRE
Vice President for Advancement
Southern Adventist University
PO Box 370
Collegedale, TN 37315-0370
PH: 423-238-2828
FX: 423-238-2495

C

✓ Mr. Christopher Carey, CFRE
Director
Andrews University
Berrien Springs, MI 49104-0660
PH: 616-471-3592
FX: 616-471-3210

Mr. Robert Caskey
Principal
Campion Academy
300 SW 42nd Street
Loveland, CO 80537
PH: 970-667-5592
FX: 970-667-5104

Mr. Charles Castle
Principal
Platte Valley Academy
19338 W Campus Drive
Shelton, NE 68876
PH: 308-647-5151
FX: 308-647-5368

Ms. Rachelle Chaney
Vice Principal & Director of
Development
Mount Pisgah Academy
75 Academy Drive
Candler, NC 28715
PH: 828-667-2535 ex 220
FX: 828-667-0657

Mr. Cyril Chern, CFRE, AIA, Esquire
Executive Vice President
Turner Development Services
520 Washington Boulevard #545
Marina del Ray, CA 90292
PH: 800-241-2978
FX: 800-209-7383

Ms. Mary Anne Chern, ACFRE, FAHP
President
White Memorial Medical Center
FOUNDATION
1720 Cesar E. Chavez Avenue
Los Angeles, CA 90033
PH: 323-260-5739
FX: 323-260-5897

Ms. Michelle Chipman
Development Specialist
Hinsdale Hospital FOUNDATION
7 Salt Creek Lane, Suite 203
Hinsdale, IL 60521
PH: 630-856-2000
FX: 630-856-2009

Elder Bjarne Christensen
Assistant to the President
North American Division of the
Seventh-day Adventist Church
12501 Old Columbia Pike
Silver Spring, MD 20904
PH: 301-680-6404
FX:

Mr. Max Church
Vice President for Development
Adventist World Radio
12501 Old Columbia Pike
Silver Spring, MD 20904
PH: 301-680-6064
FX: 301-680-6303

Mr. Jim Closser
Executive Director
Tennessee Christian Medical Center
FOUNDATION
500 Hospital Drive
Madison, TN 37115
PH: 615-860-6332
FX: 615-860-6311

Ms. Julie Collett
Director of Development
Mile High Academy
711 E Vale Avenue
Denver, CO 80210
PH: 303-744-0370
FX: 303-744-1060

Mr. David Colwell, CFRE
Director of Development
LLU- Medical Center
P. O. Box 2000, A607
Loma Linda, CA 92354-0200
PH: 909-824-4778
FX: 909-558-0378

Mr. Cyril Connelly
Assistant Dean, Enrollment &
Development
School of Public Health, Loma Linda
University
Nichol Hall, Rm 1521
Loma Linda, CA 92350
PH: 909-558-8394
FX: 909-558-4087

Mr. Glen W. Cospers
Director of Development
Metroplex Health System
2201 South Clear Creek Road
Killeen, TX 76542
PH: 254-519-8307
FX: 254-526-0634

Ms. Laurie Cravey
Director of Development
Spencerville Academy
15930 Good Hope Road
Silver Spring, MD 20905
PH: 301-421-9101
FX: 301-421-0007

D

Mr. Charles Dart
Principal
Ozark Adventist Academy
20997 Dawn Hill East Road
Gentry, AR 72734
PH: 501-736-2221
FX: 501-736-2224

Ms. LuAnn Davis
Vice President for Advancement
Union College
3800 S 48th Street
Lincoln, NE 68506
PH: 402-486-2503
FX: 402-486-02895

Mr. Dan Day
Vice President for Advancement
Columbia Union College
7600 Flower Avenue
PH: 301-891-4132
FX: 301-891-7796

Ms. Bernadine Delafield
Donor Response Manager
Global Mission
12501 Old Columbia Pike
Silver Spring, MD 20904
PH: 301-680-6074
FX: 301-680-6625

Ms. Marcie Demchuk
Executive Director
PorterCare & Avista FOUNDATION
333 W. Hampden Avenue, Suite 416
Englewood, CO 80110
PH: 303-781-5133
FX:

Ms. Kay Dickey
Director of Development
Milo Adventist Academy
PO Box 278
Days Creek, OR 97429
PH: 541-825-3291
FX: 541-825-3723

Ms. Lara Dixon
Director of Development
Gem State Academy
16115 Montana Avenue
Caldwell, ID 83605
PH: 208-459-1627
FX: 208-454-9079

Mr. Timothy Downs
Director of Development
Greater Miami Academy
500 NW 122nd Avenue
Miami, FL 33182
PH: 305-220-5955
FX: 305-220-5970

E

Ms. Kristine Elliston
Director of Development
Platte Valley Academy
19338 W. Campus Drive
Shelton, NE 68876-9640
PH: 308-647-5151
FX: 308-647-5368

Ms. Heather Enders
STEP/UP Associate
Walla Walla College
204 S College Street
College Place, WA 99324
PH: 509-527-2363
FX: 509-527-2398

F

✓ Dr. David Faehner
VP, Advancement
Andrews University
Berrien Springs, MI 49104-0650
PH: 616-471-3122
FX: 616-471-6543

Mr. Terry Farris
Development Administrator
Hong Kong Adventist Hospital
40 Stubbs Road
Hong Kong, CHINA
PH: 852-2574-6211
FX: 852-2572-9813



Ms. Consuelo Feliciano
Principal
Western Adventist Academy
PO Box 1060
Mayaguez, PR 00681
PH: 787-832-3373
FX: 787-265-4711

Ms. Diana Fish
Director of Development
WSMC/SAU
PO Box 870
Collegedale, TN 37315
PH: 423-238-2905
FX: 423-238-3168

Ms. Diana Fisher
Director of Development
Loma Linda University-Allied Health
Magan Hall, Suite B
Loma Linda, CA 92350
PH: 909-558-4261
FX: 909-558-0497

Mr. Patrick Forestell
Director of Development &
Community Relations
Parkview Hospital
329 Maine Street
Brunswick, ME 04011
PH: 207-373-2394
FX: 207-373-2161

Mr. Barry Fowler
Principal
Mount Ellis Academy
3641 Bozeman Trail Road
Bozeman, MT 59715
PH: 406-587-5178
FX: 406-587-5170

Mr. Alex Fox
Annual Fund Director
Pacific Union College
1 Angwin Avenue
Angwin, CA 94508
PH: 707-965-6312
FX: 707-965-6305

Mr. Kenneth Fox
Director of Development
Canadian University College
235 College Avenue
College Heights, AL T4L 2E5 Canada
PH: 403-782-3381
FX: 403-782-5675

G

✓ Mr. Chris Gaines
Director of Development
Campion Academy
300 SW 42nd Street
Loveland, CO 80537
PH: 970-667-5592
FX: 970-667-5104

✓ Ms. Ene Gaines
Volunteer
Campion
300 SW 42nd Street
Loveland, CO 80537
PH: 970-667-5592
FX: 970-667-5104

Ms. Vanessa Garot
Development Associate/STEP/UP
Shawnee Mission Medical Center
7315 Frontage Road, Suite 120
Shawnee Mission, KS 66204
PH: 913-676-2055
FX: 913-676-7748

Ms. Joyce Garrigus
Director of Development
Hawaiian Mission Academy
1438 Pensacola
Honolulu, HI 96822
PH: 808-536-2207
FX: 808-524-3294

Dr. Gergory Gerard
Vice President- Advancement
La Sierra University
4700 Pierce Street
Riverside, CA 92515
PH: 909-785-2500
FX: 909-785-2426

Dr. Lawrence Geraty
President
La Sierra University
4700 Pierce Street
Riverside, CA 92515
PH: 909-785-2020
FX: 909-785-2019

Mr. Bill Gerber
Director of Development
Fraser Valley Adventist Academy
Box 249
Aldergrove, BC V4W 2T8 Canada
PH: 604-607-3822 ex 317
FX: 604-856-1002

Ms. Mary Ann Giordano
Director of Special Events
Florida Hospital Foundation
2400 Bedford Road, 4th Floor
Orlando, FL 32803
PH: 407-893-9462
FX: 407-895-7935

Mr. Tommy Giordano
Chief Operating Officer
Florida Hospital Foundation
2400 Bedford Road, 4th Floor
Orlando, FL 32803
PH: 407-893-9462
FX: 407-895-7935

Ms. Myriam Gonzalez
Principal
Orangewood Adventist Academy
13732 Clinton Avenue
Garden Grove, CA 92643
PH: 714-534-4694
FX: 714-534-5931

Mr. Randy Graves
Principal
Andrews Academy
6258 Smith Road
Berrien Center, MI 49102
PH: 616-471-3138
FX: 616-471-6368

Ms. Melinda Greene
Development Associate
St. Helena Hospital
PO Box 250
Deer Park, CA 94576
PH: 707-967-5604
FX: 707-967-5601

Mr. David Greenlaw
President
Florida Hospital College
800 Lake Estelle Drive
Orlando, FL 32803
PH: 407-895-7894
FX: 407-895-7680

Mr. Albin Grohar
Executive Director of Advancement
Loma Linda University
Magan Hall, Suite B
Loma Linda, CA 92350
PH: 909-558-4997
FX: 909-558-0497

H

Ms. Jeanie Haldeman
Director of Development
Mount Vernon Academy
525 Wooster Road
Mount Vernon, OH 43050
PH: 740-397-5411
FX: 740-397-3901

Mr. Alan Hamilton
Business Manager
Fraser Valley Adventist Academy
Box 249
Aldergrove, BC V4W 2T8 Canada
PH: 604-607-3822 ex 317
FX: 604-856-1002

Ms. Carolyn Hamilton
Consultant
1661 Love Bridge Road, S.E.
Calhoun, GA 30701
PH: 706-602-0621
FX: 706-625-6557

Ms. Desiree Ham-Ying
Vice President for Advancement
Atlantic Union College
PO Box 1000
South Lancaster, MA 01561
PH: 978-368-2343
FX: 978-368-2015

Mr. Doug Harcombe
Foundation Manager
Hinsdale Hospital FOUNDATION
7 Salt Creek Lane, Suite 203
Hinsdale, IL 60521
PH: 630-856-2000
FX: 630-856-2009

Mr. Joel Hass
President
Florida Hospital Foundation
2400 Bedford Road, 4th Floor
Orlando, FL 32803
PH: 407-893-9462
FX: 407-895-7935

Ms. Christine Hauck
Executive Director
Denver Adventist Community
Services
5045 West First Avenue
Denver, CO 80219
PH: 303-935-7389
FX: 303-935-3397

Ms. Sharon Heinrich
Manager
East Pasco Medical Center FOUNDATION
7050 Gall Blvd.
Zephyrhills, FL 33541
PH: 813-783-6144
FX: 813-783-6146

Ms. Tina Heinrich
Volunteer
Sunset Lake Camp
PO Box 90
Wilkeson, WA 98396
PH: 360-829-0311
FX: 360-829-0558

Mr. Dean Helm
VP Finance
Campion Academy
300 SW 42nd Street
Loveland, CO 80537
PH: 970-667-5592
FX: 970-667-5104

Ms. Charlotte Henderson
Development Director
Great Lakes Adventist Academy
PO Box 68
Cedar Lake, MI 48812
PH: 517-427-5181
FX: 517-427-5027

Mr. Joel Henderson
Development Officer
Florida Hospital Foundation
2400 Bedford Road, 4th Floor
Orlando, FL 32803
PH: 407-893-9462
FX: 407-895-7935

Ms. Wanda Hilton
Associate Director of Annual Giving
Union College
3800 S 48th Street
Lincoln, NE 68506
PH: 402-486-2503
FX: 402-486-2895

Mr. Stan Hobbs
Principal
Bass Memorial Academy
6433 US Highway 11
Lumberton, MA 39455
PH: 601-794-8561
FX: 601-794-8881

Ms. Judith Hodder
Principal
Union Springs Academy
PO Box 524
Union Springs, NY 13160
PH: 315-889-7218
FX: 315-889-7188

Mr. Robert Hoffman, CSPG
Associate Director of Development
St. Helena Hospital
PO Box 250
Deer Park, CA 94576
PH: 707-963-6385
FX: 707-967-5601

Ms. Sheila Holder
Principal
Bermuda Institute
PO Box SN 114
Southampton SNBX Bermuda
PH: 441-238-1566
FX: 441-238-1309

Mr. Paul Hopkins
Assistant Development Director
Adventist World Radio
12501 Old Columbia Pike
Silver Spring, MD 20904
PH: 301-680-6299
FX: 301-680-6303

Mr. Eckhard Hubin
Associate Director, Planned
Giving/Trust Services
Andrews University
Berrien Springs, MI 49104-0645
PH: 616-471-3613
FX: 616-471-3210

Mr. Timothy Hullquist
President
Project: Steps to Christ
PO Box 361
Brushton, NY 12916
PH: 518-358-2541
FX: 518-358-3028

Mr. Jeff Hurst
Chief Financial Officer
Florida Hospital Foundation
2400 Bedford Road, 4th Floor
Orlando, FL 32803
PH: 407-893-9462
FX: 407-895-7935

J

Mr. Don Jacobsen
President
Adventist World Radio
12501 Old Columbia Pike
Silver Spring, MD 20904
PH: 301-680-6305
FX: 301-680-6303

Ms. Kim Jahna
Foundation Assistant
Florida Hospital Heartland Division
3420 US 27, North
Sebring, FL 33870
PH: 941-402-5435
FX: 941-402-5439

Mr. John Janes
Principal
Fraser Valley Adventist Academy
Box 249
Aldergrove, BC V4W 2T8 CANADA
PH: 604-607-3822
FX: 604-856-1002

Ms. Lisa Jardine
Assistant Director
Andrews University
Berrien Springs, MI 49104-0950
PH: 616-471-3591
FX: 616-471-3690

Mr. Julio Javier
WTPM-Radio Paraiso
Box 1629
Mayaguez, PR 00681
PH: 787-831-9200
FX:

Ms. Elaine John
Executive Director of the Foundation
St. Helena Hospital
PO Box 250
Deer Park, CA 94576
PH: 707-963-6406
FX: 707-967-5601

Ms. Becky Johnson
Volunteer for Development
Paradise Adventist Academy
5699 Academy Drive
Paradise, CA 95967
PH: 530-892-2384
FX: 530-892-0449

fourbjs@aol.com

Dr. Karen Johnson, CFRE
Vice President for Advancement
Walla Walla College
204 S College Street
College Place, WA 99324
PH: 509-527-2093
FX: 509-527-2398

Mr. Douglas Jones
Director of University Relations
Andrews University
Berrien Springs, MI 49104-1000
PH: 616-471-3345
FX: 616-471-6650

K

✓ Mr. David Kinsey
Grantwriter & Researcher
Loma Linda University
Magan Hall, Suite B
Loma Linda, CA 92350
PH: 909-558-6692
FX: 909-558-0497

Elder Lloyd Knecht
Public Relations & Fund Raising
Glad Tidings
8784 Valleyview Drive
Berrien Springs, MI 49103
PH: 616-473-1888
FX: 616-473-5851

Ms. Amy Worrell Kneller
Director of Development & Alumni
Relations
Auburn Adventist Academy
5000 Auburn Way South
Auburn, WA 98092
PH: 253-939-5000 ex 253
FX: 253-351-9806

Mr. John Korb
Philanthropy Services Director
Adventist Medical Center
10123 SE Market Street
Portland, OR 97216
PH: 503-251-6197
FX: 503-261-6089

Dr. Larry Kromann
Principal
Takoma Academy
8120 Carroll Avenue
PH: 301-434-4700
FX: 301-434-4814

L

Mr. Chris LeBrun
Associate Director of Development
Enterprise Academy
PO Box 215
Enterprise, KS 67441
PH: 785-263-8211
FX: 785-263-8368

Mr. Marvin Lee
Executive Director
New Life Institute
10091 Streeter Road, Suite 10
PH: 530-268-6416
FX: 530-268-6411

Ms. Kellie Lind
Alumni Director
Pacific Union College
1 Angwin Avenue
Angwin, CA 94508
PH: 707-965-7500
FX: 707-965-6305

Ms. Karen Lippert
Director of Research
Florida Hospital Foundation
2400 Bedford Road, 4th Floor
Orlando, FL 32803
PH: 407-893-9462
FX: 407-895-7935

Elder Rick Lofton
Director of Development
Valley Grande Academy
1000 South Bridge Avenue
Weslaco, TX 78596
PH: 956-968-0573
FX: 956-968-9814

Mr. Vincent Lopez
Director of Development
Forest Lake Academy
3909 E. Semoran BLVD
Apopka, FL 32703
PH: 407-862-8411 ex 233
FX: 407-862-7050

Ms. Carol Loree
Alumni Director
Southern Adventist University
Wright Hall
Collegedale, TN 37315
PH:
FX:

Mr. Marc Lovejoy
Principal
Mile High Adventist Academy
711 East Yale
Denver, CO 80210
PH: 303-744-1069
FX: 303-744-1060

M

Ms. Marilyn Mandes
Development Officer
Florida Hospital Foundation
2400 Bedford Road, 4th Floor
Orlando, FL 32803
PH: 407-893-9462
FX: 407-895-7935

Dr. Lynn Martell
Vice President of Advancement
Loma Linda University
Loma Linda, CA 92350
PH: 909-558-4597
FX: 909-558-4577

Dr. Manzoor Massey
Director of Development
San Joaquin Community Hospital
2615 Eye Street
Bakersfield, CA 93303-2615
PH: 661-326-4123
FX: 661-324-4546

Ms. Rebecca May
Director, Alumni Services
Andrews University
Berrien Springs, MI 49104-0950
PH: 616-471-3591
FX: 616-471-3690

Mr. David McElwee
Director, Mayor & Planned Gifts
Kettering Medical Center Foundation
3535 Southern Boulevard
PH: 937-296-7207
FX: 937-296-4227

Ms. Kara McGhee
Director of Development
Columbia Adventist Academy
11100 NE 189th Street
Battle Ground, WA 98604
PH: 360-687-3161
FX: 360-687-9856

Dr. L. Roo McKenzie
Head Principal
Loma Linda Academy
10656 Anderson Street
Loma Linda, CA 92354
PH: 909-796-0161
FX: 909-799-8049

Mr. Todd Mekelburg
Director of Leadership Giving
Union College
3800 S. 48th Street
Lincoln, NE 68506
PH: 402-486-2503
FX: 402-486-2895

Ms. Jacqueline Messenger
Principal
Spencerville Adventist Academy
15930 Good Hope Road
Silver Spring, MD 20905
PH: 301-421-9101
FX: 301-421-0007

Ms. Sallie Meyer
Director of Development
Battle Creek Academy
480 Parkway Drive
Battlecreek, MI 49017
PH: 616-965-1278
FX: 616-965-3250

Ms. Barbara Miller
Assistant Director, Nursing
Loma Linda University
Magan Hall, Suite B
Loma Linda, CA 92350
PH: 909-558-8682
FX: 909-558-0497

Mr. Josefer Montes
Director of Development
Bass Memorial Academy
6433 US Highway 11
Lumberton, MS 39455
PH: 601-794-8561
FX: 601-794-8881

Mr. Josue Murillo
Asst. to the President for
Advancement
University of Montemorelos
Libertad #1300 Ponsente
Montemorelos, Nuevo Leon Mexico
PH: 826-33584
FX: 826-33404

Ms. Chris Murray, CFRE
President
Glendale Adventist Medical Center
FOUNDATION
1509 Wilson Terrace
Glendale, CA 91206
PH: 818-409-8055
FX: 818-546-5655

✓ Mr. Milton Murray, FAHP
13032 Ingleside Drive
Beltsville, MD 20705
PH: 301-572-4854
FX: 301-572-5211

N

Mr. John Nafie
Principal
Mount Pisgah Academy
75 Academy Drive
Candler, NC 28715
PH: 828-667-2535 ex 219
FX: 828-667-0657

Mr. John Negley
Foundation Director
Florida Hospital Heartland Division
PO Box 9400
Sebring, FL 33871
PH: 941-402-5435
FX: 941-402-5439

Mr. Ken Norton
Director of Development
Southern Adventist University
PO Box 370
Collegedale, TN 37315
PH: 423-238-2781
FX: 423-238-2495

O

Mr. J.V. Orsak, FAHP
Vice President of Development
South Coast Medical Center
31872 Coast Highway
Laguna Beach, CA 92651
PH: 949-499-7229
FX: 949-499-5789

Ozark Academy
20997 Dawn Hill East Road
Gentry, AR 72734
PH: 501-736-2221
FX: 501-736-2224

P

Ms. Donna Pedigo
Director of Development
Highland View Academy
10100 Academy Drive
Hagerstown, MD 21769
PH: 301-739-8480 ex 207
FX: 301-733-4770

Mr. Bruce Peifer
Executive Director
Oakwood College
7000 Adventist Boulevard
Huntsville, AL 35896
PH: 256-726-7312
FX: 256-726-7316

Mr. John Peralta, CFRE
Director of Development
Rio Lindo Adventist Academy
3200 Rio Lindo Ave
Healdsburg, CA 95448-9498
PH: 707-431-5100; ext. 121
FX: 707-431-5115

Mr. Don Perkins
Principal
Battle Creek Academy
480 Parkway Drive
Battle Creek, MI 49017
PH: 616-965-1278
FX: 616-965-3250

Mr. James Pinder
Grantwriter & Prospect Researcher
Walla Walla College
204 S College Avenue
College Place, WA 99324
PH: 509-527-2644
FX: 509-527-2398

Mr. Larry Pitcher
President
Christian Record Services
4444 S 52nd Street
Lincoln, NE 68516
PH: 402-488-0981
FX: 402-488-7582

Mr. Perry Pollman
Vice Principal
Georgia-Cumberland Academy
397 Academy Drive, SW
Calhoun, GA 30701
PH: 706-629-4591
FX: 706-629-1272

Ms. Christy Prevo
Director of Development
Sunnydale Adventist Academy
447 S. 55th Street
Lincoln, NE 68510
PH: 573-682-2164
FX: 573-682-3136

Mr. Don Prior
11524 Richmond Road
Loma Linda, CA 92354
PH: 909-796-2133
FX:

Mr. Victor Prosper
Treasurer
West Puerto Rico SDA Conference
Box 1629
Mayaguez, PR 00681
PH: 787-834-6095
FX: 787-805-3279

Mr. John Portello
Development Officer
Florida Hospital Foundation
2400 Bedford Road, 4th Floor
Orlando, FL 32803
PH: 407-893-9462
FX: 407-895-7935

R

Mr. Rob Raney
Director of Development
Union Springs Academy
PO Box 524
Union Springs, NY 13160
PH: 315-889-7314
FX: 315-889-7188

Ms. Jeannette Regalado
Director of Development
Walla Walla General Hospital
PO Box 1398
Walla Walla, WA 99362
PH: 509-527-8192
FX: 509-527-8178

Mr. Randee Reynolds
Treasurer
Florida Conference of SDAs
PO Box 2626
Winter Park, FL 32790
PH: 407-644-5000
FX: 407-644-7550

Mr. Reiner Roeske
Director
Children's Hospital Foundation
LLU-Children's Hospital
11234 Anderson Street
Room 1816
Loma Linda, CA 92354
PH: 909-558-8008
FX: 909-558-0223

S

Mr. Brooke Sadler
Consultant
400 Kinser Park Lane
Greeneville, TN 37743
PH: 423-787-7947
FX: 423-787-9247

Mr. James Sailer
President
Kettering Medical Center Foundation
3535 Southern Boulevard
Kettering, OH 45429
PH: 937-296-7207
FX: 937-296-4227

Mr. Jack Sarourin
Accounting Clerk
Project: Steps to Christ
PO Box 361
Brushton, NY 12916
PH: 518-358-2541
FX: 518-358-3028

Mr. Ron Sauder, CFRE
Director of Development
Castle Medical Center
640 Ulukahiki Street
Kailua, HI 96734
PH: 808-263-5335
FX: 808-263-5224

Ms. Candace Sayler
Director, Alumni Relations
Canadian University College
235 College Avenue
College Heights, AB T4L 2E5
PH: 403-782-3381 X459
FX: 403-782-5675

Dr. Charles Scriven
President
Columbia Union College
7600 Flower Avenue
Takoma Park, MD 20912
PH: 301-891-4132
FX: 301-891-4590

Mr. Blondel Senior
Executive Director
Advent Home Youth Services
900 Country Road 950
Calhoun, TN 37309
PH: 423-336-5052
FX: 423-336-8224

Ms. Frigga Simmons
Director of Development
Bermuda Institute
PO Box SN 114
Southampton, Bermuda SNBX
PH: 441-238-1566
FX: 441-238-1309

Ms. Linda Skinner
Director of Development
Union College
3800 S 48th Street
Lincoln, NE 68506
PH: 402-486-2503
FX: 402-486-2895

Mr. Harry Smith
Development Officer
Florida Hospital Foundation
2400 Bedford Road, 4th Floor
Orlando, FL 32803
PH: 407-893-9462
FX: 407-895-7935

Mr. Paul Smith
Director of Planned Giving
Southern Adventist University
PO Box 370
Collegedale, TN 37315
PH: 423-238-2832
FX: 423-238-2451

Ms. Hebe Soares
Director of Marketing &
Development
Garden State Academy
PO Box 520
Tranquility, NJ 07879-0520
PH: 908-852-0300
FX: 908-850-8211

Mr. Scott Steward
Marketing Director
Amazing Facts
PO Box 1058
Roseville, CA 95678
PH: 916-434-3880
FX: 916-434-3889

Ms. Kathleen Sutton
Director of Advancement
Blue Mountain Academy
2363 Mountain Road
Hamburg, PA 19526
PH: 610-562-4214
FX: 610-562-8050

T

Mr. Loren Taber
Principal
Mount Vernon Academy
525 Wooster Road
Mount Vernon, OH 43050
PH: 740-397-5411
FX: 740-397-3901

Ms. Sharon Terrell
Director of Planned Giving & Trust
Services
Andrews University
Administration Building, Room 302
Berrien Springs, MI 49104
PH: 616-471-6518
FX: 616-471-6543

Mr. John Thomas
Principal
Wisconsin Academy
N2355 Duborg Road
Columbus, WI 53295
PH: 920-623-3300
FX: 920-623-3318

Ms. Tiffany Thompson
Director of Development
Collegedale Academy
PO Box 628
Collegedale, TN 37315
PH: 423-396-2124
FX: 423-396-2124

Mr. Dan Tilstra
Director of Development
Modesto Adventist Academy
2036 E Hatch Road
Modesto, CA 95351
PH: 209-537-4008
FX: 209-538-0706

Ms. Rosemary Tyler
School Board Chair
San Francisco Junior Academy
219 Los Palmos Drive
San Francisco, CA 94127
PH: 445-333-1316
FX:

V

Mr. Hector Valentin
Director
Academia Adventista
Bella Vista Gr #35
Mayaguez, PR 00681
PH: 787-265-8126
FX:

Mr. Samuel Valentin
Marketing Director
Bella Vista Southwestern Hospital
PO Box 68
Yauco, PR 00698
PH: 787-856-2105
FX: 787-856-0264

Mr. Norman Vance
Vice President
Feather River Hospital
5974 Pentz Road
Paradise, CA 95969-5593
PH: 530-876-7208
FX: 530-786-2157

Dr. Moises Velazquez
Educational Director
West Puerto Rico SDA Conference
Box 1629
Mayaguez, PR 00681
PH: 787-834-6095
FX: 787-805-3279

Mr. Jeff Veness
Vice President for Advancement
Pacific Union College
1 Angwin Avenue
Angwin, CA 94508
PH: 707-965-7500
FX: 707-965-6305

Mr. John Vixie
Principal
Modesto Adventist Academy
2036 E Hatch Road
Modesto, CA 95351
PH: 209-537-4521
FX: 209-538-0706

Ms. Berit von Pohle
Principal
Columbia Adventist Academy
11100 NE 189th Street
Battle Ground, WA 98604
PH: 360-687-3161
FX: 360-687-9856

W

Ms. Patsy Wagner
Director of Development
Project PATCH
13455 SE 97th Avenue
Clackamas, OR 97015
PH: 503-653-8086
FX: 503-653-8265

Mr. Walter Wasyliuk
Director of Development
Kingsway College
1200 Leland Road
Oshawa, ON L1K 2H4 Canada
PH: 905-433-1144
FX: 905-433-1156

Mr. Don Watson
Principal
Greater Miami Academy
500 NW 122nd Avenue
PH: 305-220-5955
FX: 305-553-2513

Mr. Jim Weller
Principal
Hawaiian Mission Academy
1438 Pensacola
Honolulu, HI 96822
PH: 808-536-2207
FX: 808-533-1780

Ms. Vi Westman
Volunteer
Sunset Lake Camp
PO Box 90
Wilkeson, WA 98396
PH: 360-829-0311
FX: 360-829-0558

Mr. John Wheaton
Principal
Forest Lake Academy
3909 E. Semoran Blvd.
Apopka, FL 32703
PH: 407-862-8411
FX: 407-862-7050

Mr. Don Wildman
Director of Development
Florida Hospital Foundation
2400 Bedford Road, 4th Floor
Orlando, FL 32803
PH: 407-893-9462
FX: 407-895-7935

Ms. Wendy Fox Will
Senior Development Officer
Shady Grove Adventist Hospital
9901 Medical Center Drive
Rockville, MD 20850
PH: 301-279-6534
FX: 301-217-5252

Ms. Teresa Witt
Development Associate
Shady Grove Adventist Hospital
9901 Medical Center Drive
Rockville, MD 20850
PH: 301-279-6571
FX: 301-217-5252

Ms. Gail Witzlsteiner
Development Associate
Sonora Community Hospital
1 South Forest Road
Sonora, CA 95370
PH: 209-532-3161
FX: 209-532-9134

Mr. Dan Worthington
ASU Trust & Estates Counsel
Florida Hospital Foundation
2400 Bedford Road, 4th Floor
Orlando, FL 32803
PH: 407-893-9462
FX: 407-895-7935

Mr. Robert Woolford
Assistant to the President
Shawnee Mission Medical Center
7315 Frontage Road, Suite 120
Shawnee Mission, KS 66204
PH: 913-676-2051
FX: 913-676-7748

✓ Ms. Cheryl Wren
Director of Development
Walla Walla Valley Academy
300 SW Academy Way
College Place, WA 99324
PH: 509-525-1050
FX: 509-525-1056

Ms. Judy Wright
Director, Direct Mail Management
Christian Record Services
PO Box 6097
Lincoln, NE 68506-9985
PH: 402-488-0981
FX: 402-488-7582

The
Ministry of
Philanthropy

Section 8

1999 Conference on
Philanthropy



BSI

Philanthropic GIFT

Year 2000 "Giving is Caring" Calendar

Our 15th Year!

Thought provoking
inspirational quotations
every day!

SDSU
ANNUAL FUND
Creating Opportunities...
Defining Success

If children live with praise, they learn to
appreciate it and give it to others.

Dorothy Niles

Lakeland
Health Foundation
Benton Harbor/St. Joseph

The more sympathy you give, the less you
need.

Malcolm S. Forbes

Your logo imprinted
on every page!

LOMA LINDA
UNIVERSITY

The highest things in our civilization are
a sense of personal responsibility, a spirit
of benevolence, and holding up the lamp
of voluntary action.

Insert Event Dates Here!
(40 Character Limit, Any Combination)

Insert your own event dates
to personalize the calendar
even further!

(Two 40-character lines are available.)

Giving is Caring

We are the sum of our actions, therefore
our habits make all the difference.

Aristotle

Thursday
May
2000

25

This is the
standard calendar

2000 Giving is Caring Calendar

W Amherst H.
Wildier Foundation
Since 1906

January - December 2000

Each calendar
features a
large logo cover page!

Shawnee Mission
Medical Center

Phone:
(913) 676-2055
Fax:
(913) 676-7748

There are no hopeless situations; there are
only people who have grown hopeless

Clare Booth Luce

Friday
July
2000

7

Each page
includes current and
upcoming month
mini calendar
for planning at
a glance!

Three colors
of stands
can be matched
with any of the
9 paper designs!

Kettering Medical Center Foundation

14
Friday

All seeds of courtesy and
kindness will bear fruit of
happiness, but some of
them will grow into
benevolence.

Jeremy Beetham

April 2000

Notes:

Our new ColorBar Paper Design
features larger numbers and a
"notes" area for your convenience.

Available in:

★ Blue (shown)

★ Red

★ Green

Gift boxes available...
or this color front page
can be substituted to save money!

2000 *Giving is Caring* Calendar Order Form

A daily source of inspiration and guidance toward a life of generosity and service that your donors, volunteers, prospects, media contacts, community leaders, and professional colleagues will appreciate.

When you customize the calendar by adding your name to the top of each page, you get marketing exposure every where the quotations travel. It's hard to imagine a better link between your nonprofit and the people who support it.

Name _____ Title _____
 Organization _____ Shipping Address _____
 City _____ ST _____ Zip _____ Phone () _____ Fax _____
 E-mail Address _____ Purchase Order No. _____
 Credit Card Number _____ Expires ____/____ Signature _____

Calendar Information for Standard OR Custom Calendars

Quantity	Unit Cost	Subtotal	Gift Boxes (.25 cents each)	Shipping	Order Total	
# _____	x \$ _____	= \$ _____	+ \$ _____	+ \$ _____	= \$ _____	Include # _____ red gift boxes with gold bow Include # _____ cardboard mailing cartons

PRICING

	1-4	5-49	50-99	100-199	200-499	500-999	1000-1499	1500+
Standard before July 31	\$10.95	\$6.75	\$6.25	\$5.75	\$5.25	\$4.75	\$4.15	\$4.00
Standard after July 31	\$10.95	\$6.75	\$6.50	\$6.00	\$5.75	\$5.25	\$4.65	\$4.50
Custom before July 31	_____	_____	\$7.45	\$7.25	\$6.75	\$5.85	\$4.85	\$4.75
Custom after July 31	_____	_____	\$7.75	\$7.65	\$7.10	\$6.10	\$5.10	\$4.85
Shipping and handling	(Included) For quantities of five or more, shipping is 10% of subtotal. Standard calendars are usually <u>shipped</u> in 1-2 weeks. Custom calendars are usually <u>shipped</u> in 3-6 weeks.							

ADDITIONAL INFORMATION - ONLY for Custom Calendar Orders

☐ My camera-ready art of logo is enclosed (Do not send disks or half-tones. Reproduction size is 3.5" wide x 7/8" high.)

Start my calendars in _____ (if no month is named, calendars will run from January through December)

Paper: ☐ blue parchment ☐ tan parchment ☐ jade parchment ☐ clouds ☐ white ☐ paintbrush ☐ red color stripe
☐ green color stripe ☐ blue color stripe

Plastic stand: ☐ frosted ☐ tan ☐ black

Cover page: ☐ standard glossy red cover with gold bow (looks like front of presentation box) ☐ enlarged logo on paper above

☐ My event dates are listed on a separate sheet of paper (80 characters maximum per event. 25 are free. Additional events are \$2 each).

☐ Ship all the calendars to the address above by ____/____/____ (\$50 RUSH charge added, if needed in less than 3 weeks)

Mail-house Services: ☐ Mail individual calendars bulk rate for \$1.55 ea. (I have enclosed labels and inserts (maximum size is 5.5" x 8.5"))

☐ Mail individual calendars first-class for \$3.95 ea. (I have enclosed labels and inserts (maximum size is 5.5" x 8.5"))

☐ I would like the people on my list to receive their calendars between ____/____/____ and ____/____/____



Professional Development Books

Accent on Humor III: Philanthropy Illustrated—

Compiled \$5 (retail \$10)

This third edition of the highly successful *Accent on Humor* series is packed with over 140 cartoons on 22 subjects related to philanthropy, plus quips, quotes and anecdotes.

Achieving Excellence—by Henry Rosso \$35 (retail \$43)

This comprehensive guide explains major fund raising principles and techniques. *NSFRE recommends this book when preparing for professional certification.*

Beyond Fund Raising—By Kay Sprinkle Grace \$25 (retail \$30)

Focuses on new development strategies that will assist in developing long-term relationships with donors and volunteers. *NSFRE recommends this book when preparing for professional certification.*

Black Tie Optional—by Freedman/Smith \$25 (retail \$35)

This thorough handbook contains all the ingredients to make a special event a success.

Board Member's Guide to Fund Raising—by Fisher Howe \$15 (retail \$26)

This comprehensive resource shows trustees why and how to use their talents as a vital part of the role that governing boards play in the fund raising process.

Boardroom Verities—by Jerry Panas \$30 (retail \$40)

This exhaustive study reveals eighty factors that motivate trustees

to devote the necessary time and energy to be a proper steward to an institution.

Born to Raise—by Jerry Panas \$30 (retail \$40)

This book sets the standard for determining what factors make a successful fund raiser. It will prove invaluable to board members, volunteers, and CEOs who supervise.

Designs for Fund Raising—by Herold Seymour \$35 (retail \$40)

After 25 years, this is still the "bible" of fund raising. It covers principles, patterns, and techniques.

Development Handbook—Compiled \$30 (retail \$40)

This overview shows how development programs at independent schools must continually evolve to remain effective. It also illustrates the impact of educating donors to give fewer, larger, more meaningful gifts.

Excel—by Jerold Panas \$5

"Excel" is the single word that best describes the author's commitment to life. The essays in this book give testimony to that unbounded drive and passion for achievement.

Finders Keepers—by Jerold Panas \$30 (retail \$40)

A behind-the-scenes look at the strategies and skills that lead to successful fund raising. It's filled with instructive anecdotes, case histories, and interviews. While written for professional and aspiring fund raisers, board members and volunteers will also benefit.

Fund Raising Cost Effectiveness (with diskette)—by James Greenfield \$25 Close-out special.

This self-assessment workbook provides reliable methods of comparing budget and net return.

Fund Raising & Marketing in the One-Person Shop—by Michael J. Henley & Diane L. Hodiak \$20 (retail \$30)

Whether you're a novice, expert, volunteer or staff member, this book will provide fresh, practical field-tested solutions to help you manage your limited resources more effectively. It will help you position your organization to stand out from the competition. A must-have reference for anyone with a small staff or budget. An easy to read, excellent training manual for those new to the field.

Give to Live—by Doug Lawson \$8 (retail \$12)

This extraordinary work shows how giving benefits the giver. It offers reasons and ways to analyze your purpose in life, and gives steps that will make you happier.

Governing Boards—by Cyril Houle \$20 (retail \$28)

The most up-to-date guide on improving governing boards.

How to Rate Your Development Office—by Berendt/Taft \$10 Close-out special.

This book will help administrators understand fund raising, so they can analyze the effectiveness of development and marketing programs.

How to Write Successful Fund Raising Letters—by Mal Warwick \$30 (retail \$40)

Mal Warwick shares techniques that helped him raise more than 100 million dollars by mail. The book is packed with real-world examples, illustrations, and case studies.

NSFRE recommends this book when preparing for professional certification.

Mega Gifts—by Jerry Panas \$30 (retail \$40)

This book is the first to reveal how fund raisers can find a wealthy donor's "hot button" and then push it, to secure large gifts for their institutions. *NSFRE considers it one of the 25 most important books on fund raising.*

Rosso on Fund Raising—by Henry Rosso \$20 (retail \$26)

As one of the most beloved and respected masters in the field, Henry Rosso shares his wisdom and insight on the essential ingredients of fund raising success, including leadership, stewardship, the art of asking, building relationship, and more.

The Artful Journey: Cultivating and Soliciting the Major Gift—by Bill Sturtevant \$30 (retail \$40)

A comprehensive, practical book—full of nuts and bolts—that fills an urgent void. It's a fail-proof road map to the fine art of major gift fund raising. Great reading for seasoned specialists, development officers, trustees or volunteers.

The "How To" Grants Manual (revised edition)—by David Bauer \$25 (retail \$30)

A guide to types and sources of government grants, qualifications for each type, amount each source will give, and how to ask so you will succeed.

The Makings of a Philanthropic Fund Raiser—by Ron Knott \$20 (retail \$32)

This biography about Milton Murray, explores the personal characteristics that led to a distinguished 40-year career of service to others.

The President and Fund Raising—by Fisher Quehl \$15 Close-out special.

This practical book gives presidents the ideas, perspectives, and basic skills needed to meet the challenge of shrinking federal support by leading successful campaigns for private sources of funds.

The Raising of Money—by James G. Lord \$20 (retail \$40) Close-out special.

This book is about people—how they think, feel, and act when involved in philanthropy. It focuses on important principles of donor and institutional development that precede campaigning and face-to-face solicitation.

Too Soon to Quit—by Harry Moyle Tippet \$5 (retail \$9)

This book will help you find the strength to overcome the hurdles in life, and it will call you to re-affirm American values as few books will—and make you a better person.

Voices From the Heart—by Brian O'Connell \$15 (retail \$20)

This elegant collection of photo-essays is a tribute to the spirit of giving exemplified by America's volunteers—the people who are committed to solving problems, and working to build strong communities. These are the everyday heroes whose acts of kindness resonate through the country.

Volunteering: 101 Ways to Improve the World—by Douglas M. Lawson \$5 (retail \$8)

If you ever wondered how you could or why you should make life better for others, and yourself, this book is for you.

Words of Wisdom—Compiled \$5 Close-out special. (retail \$15)

An invaluable resource of over 2,700 great quotations on topics related to philanthropy (taken from past editions of the *Giving is Caring* Page-a-Day calendar).

Other Products Available From Philanthropic GIFT:

Philanthropy Stamp Posters
—10 for \$35 (free shipping)

Philanthrobes
—\$7 each

Photo Note Cards
—\$5 per set of 18 cards and envelopes

Quote Note Cards
—\$5 per set of 20 cards and envelopes

Order forms for the 2000 *Giving is Caring* calendar

Catalogs of custom imprinted promotional products

Sunday Feature

Professional Development Books

	RETAIL	OUR PRICE
<p><i>How to Write Successful Fund Raising Letters</i>—by Mal Warwick</p> <p>Mal Warwick shares techniques that helped him raise more than 100 million dollars by mail. The book is packed with real-world examples, illustrations, and case studies.</p>	\$40	\$30
<p><i>Governing Boards</i>—by Cyril Houle</p> <p>The most up-to-date guide on improving governing boards.</p>	\$28	\$20
<p><i>Boardroom Verities</i>—by Jerry Panas</p> <p>This exhaustive study reveals eighty factors that motivate trustees to devote the necessary time and energy to be a proper steward to an institution.</p>	\$40	\$30
<p><i>The President and Fund Raising</i></p> <p>This practical book gives presidents the ideas, perspectives, and basic skills needed to meet the challenge of shrinking federal support by leading successful campaigns for private sources of funds.</p>	out of print	\$15 Close-out SPECIAL
<p><i>The Makings of a Philanthropic Fund Raiser</i></p> <p>This biography about Milton Murray, by Ron Knott, explores the personal characteristics that led to a distinguished 40-year career of service to others.</p>	\$32	\$20
<p><i>Accent on Humor III: Philanthropy Illustrated</i></p> <p>This third edition of the highly successful Accent on Humor series is packed with over 140 cartoons on 22 subjects related to philanthropy, plus quips, quotes and anecdotes.</p>	\$10	\$5
<p><i>Words of Wisdom: for Writer's, Speakers & Leaders</i></p> <p>An invaluable resource of over 2,700 great quotations on topics related to philanthropy (taken from past editions of the <i>Giving is Caring</i> Page-a-Day calendar).</p>	\$15	\$5 Close-out SPECIAL

Monday Feature

Professional Development Books

	RETAIL	OUR PRICE
<p><i>The Art of Fielding Questions with Finesse</i>—by Mary Jane Mapes</p> <p>This is a practical guide loaded with strategies for handling difficult people, sensitive situations, and tough questions. This book will provide you with a wealth of ideas for handling any question and answer session with the finesse of a real pro.</p>	\$10	\$10
<p><i>Listening: The Secret to Unlocking Closed Minds</i>—by Mary Jane Mapes</p> <p>This single cassette is packed with excellent ideas that will help make you a better listener. You will discover barriers to effective communication and the benefits to active listening. You will discover how listening can help you sell your product or idea, lower the emotional temperature of others, handle conflict effectively, and move people from where they are to where you'd like them to be.</p>	\$15	\$15
<p><i>Mega Gifts</i>—by Jerry Panas</p> <p>This book is the first to reveal how fund raisers can find a wealthy donor's "hot button" and then push it, to secure large gifts for their institutions. NSFRE considers it one of the 25 most important books on fund raising.</p>	\$40	\$30
<p><i>The Artful Journey: Cultivating Major Gifts</i></p> <p>This comprehensive, practical book, by Bill Sturtevant, is full of nuts and bolts, and it fills an urgent void. It's a fail-proof road map to the fine art of major gift fund raising. Great reading for seasoned specialists, development officers, trustees or volunteers.</p>	\$40	\$30
<p><i>Achieving Excellence</i>—by Henry Rosso</p> <p>This comprehensive guide explains major fund raising principles and techniques.</p>	\$43	\$35
<p><i>The Makings of a Philanthropic Fund Raiser</i></p> <p>This biography about Milton Murray, by Ron Knott, explores the personal characteristics that led to a distinguished 40-year career of service to others.</p>	\$32	\$20
<p><i>Accent on Humor III: Philanthropy Illustrated</i></p> <p>This third edition of the highly successful <i>Accent on Humor</i> series is packed with over 140 cartoons on 22 subjects related to philanthropy, plus quips, quotes and anecdotes.</p>	\$10	\$5
<p><i>Words of Wisdom for Writer's, Speakers & Leaders</i></p> <p>An invaluable resource of over 2,700 great quotations on topics related to philanthropy (taken from past editions of the <i>Giving is Caring</i> Page-a-Day calendar).</p>	\$15	\$5
		Close-out SPECIAL

Tuesday Feature

Professional Development Books

	RETAIL	OUR PRICE
<p><i>Rosso on Fund Raising</i>—by Henry Rosso</p> <p>As one of the most beloved and respected masters in the field, Henry Rosso shares his wisdom and insight on the essential ingredients of fund raising success, including leadership, stewardship, the art of asking, building relationship, and more.</p>	\$26	\$20
<p><i>Designs for Fund Raising</i>—by Herold Seymour</p> <p>After 25 years, this is still the “bible” of fund raising. It covers principles, patterns, and techniques.</p>	\$40	\$35
<p><i>Born to Raise</i>—by Jerry Panas</p> <p>This book sets the standard for determining what factors make a successful fund raiser. It will prove invaluable to board members, volunteers, and CEOs who supervise.</p>	\$40	\$30
<p><i>The Makings of a Philanthropic Fund Raiser</i></p> <p>This biography about Milton Murray, by Ron Knott, explores the personal characteristics that led to a distinguished 40-year career of service to others.</p>	\$32	\$20
<p><i>Accent on Humor III: Philanthropy Illustrated</i></p> <p>This third edition of the highly successful Accent on Humor series is packed with over 140 cartoons on 22 subjects related to philanthropy, plus quips, quotes and anecdotes.</p>	\$10	\$5
<p><i>Words of Wisdom for Writer's, Speakers & Leaders</i></p> <p>An invaluable resource of over 2,700 great quotations on topics related to philanthropy (taken from past editions of the <i>Giving is Caring</i> Page-a-Day calendar).</p>	\$15	\$5 Close-out SPECIAL

Ministry of Influence - Believing in people

A.

B.

C.

D. Show appreciation / give credit

E. Give encouragement

F. Have faith in people
(get them to have faith in themselves)

Believe in them before they succeed

Emphasize their strengths

List their past successes

Instill confidence when they fail - never let the fear
of striking out get in the way

Experience

Visualize their future success

Expect a new level of thinking when you believe in people